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ABSTRACT

This study is intended to stimulate rapid adoption of long-range planning in Oregon education. A principal study goal has been to review present planning activities in the state and determine future planning needs. Emphasis has been placed on long-range planning as a specific process that should and can be incorporated within the organizational patterns of educational institutions, districts, and state agencies. Chapter 1 presents the need for long-range planning. A discussion of the planning process and major issues is included as well. This chapter is based on materials examined by the study committee and many meetings with educators and leaders across the state. The major conclusions of the committee and its recommendations are summarized in Chapter 2 for easy reference. The recommendations are grouped by level of responsibility such as local boards, state agencies, and the legislature. Chapter 3 contains a discussion of each recommendation. The purposes and expected outcomes of the recommendations are identified, together with related issues and points of concern. (Author/MLF)

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LONG-RANGE PLANNING FOR OREGON EDUCATION

Report of the
Committee on Educational Planning
to the
Foundation for Oregon Research and Education

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Foundation for Oregon Research & Education (FORE)
217 Mohawk Building - 222 S.W. Morrison
Portland, Oregon 97204
(503) 226-1235

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I am extremely pleased to acknowledge the time and effort contributed by the members of the committee. Their intensity of interest and sustained participation are highly valued and appreciated.

On behalf of the Board of Directors and staff of FORE, I want to thank the committee and the more than 450 contributors whose support is vital to our efforts.

Samuel C. Wheeler

"FORE"word

Spreading taxpayer revolt, failing school elections and many local and state issues dominate the educational scene in Oregon. Difficult financial conditions and dissatisfaction with educational performance are coupled with increasing political, accountability and social burdens placed on education. Oregon's educational future is a matter of great concern to educators, community and state leaders, and the taxpaying public.

Oregon citizens and community leaders do not have a common understanding of the mission and goals of education. Without broadly shared and understood educational objectives there is no adequate basis for guiding efforts throughout the state and responding to new conditions.

The increasing complexity of education indicates that current and future problems will be more difficult to solve than those of the past. Responsibility for defining the future of education and guiding our educational systems lies first with educational leaders, staffs and faculties. If educators do not deal effectively and directly with these matters, the voters will attempt to do so. The educational establishment must seek to correct present problems, preserve flexibility of action, and define options for responding to changing conditions.

Part of the general problem is the lack of effective long-range educational planning. The Board of Directors of FORE decided that long-range planning in education was a major area of concern and in need of examination. Such concern about long-range planning follows from recognition of the variety of current educational issues and the potential contributions of effective planning to improved conditions in the state.

The need for this study arises from the apparent lack of understanding and acceptance of long-range comprehensive planning among educators, political

leaders, and citizens. Concepts and procedures of long-range or strategic planning are quite new in both public and private educational institutions. The pace of development is increasing. This study is intended to stimulate rapid adoption of long-range planning in Oregon education.

A principal study goal has been to review present planning activities in the state and determine future planning needs. Emphasis has been placed on long-range planning as a specific process which should and can be incorporated within the organizational patterns of educational institutions, districts, and state agencies. The Committee has met with many educators, administrators, and individuals with experience in both public service and the private sector. The literature of educational and business planning has been examined.

Some long-range plans were reviewed along with many specific short-term plans. Most were of limited scope and did not include provisions for updating. The study committee does not wish to detract from the value of past efforts. These efforts should, however, be part of a broad and comprehensive planning process which is lacking throughout the state. It remains true that little systematic and coordinated long-range planning is being done.

Examples of current planning which deserve mention include: North Clackamas School District 12, Central Oregon, Southwestern Oregon and Umpqua Community Colleges, Lewis and Clark College, University of Portland, Eastern Oregon State College and certain actions of the Board of Higher Education.

It has not been the intention of FORE's study committee to write a state-wide plan or to define responses to specific issues. These are among the desired results of effective planning at the local and state levels.

Implementation of the recommendations made by the study committee will lead to improved planning and stronger management in Oregon education. The responsibility for effective planning is shared by all levels and segments of education. Long-range planning for education can be accomplished without increases in staff and budget levels if current resources and capabilities are utilized in an optimal fashion. Effective planning should support, not erode, Oregon's tradition of local control.

Chapter I presents the need for long-range planning. A discussion of the planning process and major issues is included as well. This chapter is based on materials examined by the study committee and many meetings with educators and leaders across the state.

The major conclusions of the committee and its recommendations are summarized in Chapter II for easy reference. The recommendations are grouped by level of responsiblity such as local boards, state agencies, and the Legislature.

Chapter III contains a discussion of each recommendation. The purposes and expected outcomes of the recommendations are identified, together with related issues and points of concern.

The adoption of planning policies and processes by state agencies and Boards can be readily monitored. But planning activities in over 350 school districts, Education Service Districts, and community college districts will be very difficult to follow. The commitment to planning must exist at all levels. The Governor, the Legislature, and Ways and Means and Education Committees, and state agencies must assume an active management role in the conduct of state planning and in assisting local planning throughout the state.

As with past studies, FORE is prepared to work with local districts, institutions, and state agencies in implementing recommendations. This follow-through effort will begin immediately.

FORE and the members of the Study Committee are highly appreciative of the interest and cooperation extended by educators and board members across the state. Our observations during visits to many universities, colleges, community colleges and local districts have benefited greatly from the judgments, opinions, and experiences of many individuals.

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CHAPTER I

The Role of Long-Range Planning

Long-range planning for education begins with philosophical issues. To be effective and useful, the process must successfully identify and deal with educational and community philosophies and the range of fundamental goals which arise. Real and measurable improvement in education is a legitimate and proper goal. Planning processes and results can be very instrumental to that improvement. Sustained and reasoned efforts to determine future conditions, potential responses, and implications for current decisions are vital to sound management and better results.

Long-range planning is a total process, not just the preparation of a plan. The planning process has several parts, including:

--definition of planning process and activities
--recognition of philosophical principles
--goal-setting, general and specific
--development of alternative actions to achieve goals
--selection of alternatives and implementation
--evaluation of results
--recognition of changing conditions and updating of plans

Each of these is an important subject in planning theory and in practice. There is a need throughout Oregon for better understanding of the planning process, its components and the benefits of effective long-range planning.

Education will continue to be a major public activity and we must seek continually to improve educational quality and value. The many problems facing education today have a wide variety of daily impacts. There is no question that teachers, administrators, parents, students and taxpayers must continue to respond to the pressures which arise. We must recognize that most or all of these

problems have developed over long periods and must be examined in terms of past experience and future possibilities. Such assessment must be conducted in an ongoing and consistent fashion involving a broad range of individuals and institutions and seeking to identify issues, responses and contingencies which will affect decisions.

Need for Planning

The premier challenge for education today is that of better direction of the entire educational enterprise. Education at all levels must respond better, and perhaps in new ways, to public and community needs. A clearer definition of those needs and a stronger sense of mission for education are badly needed. After a long period of growth in student loads, facilities, and programs, the need and the opportunity exist to apply our capabilities and resources more effectively.

Long-range planning, in concept and practice, must be recognized and used as a key step in meeting the challenge of better direction of education. There is a need for improvement in educational philosophy, methodology, technology and operational management. There is equally a need for comprehensive and ongoing planning processes to facilitate and integrate changes and improvements in these areas.

Long-range planning must be made a part of the ongoing process and responsibility of educational management. Such a commitment will aid in the development of leadership and an improved vision of the future. Students, educators and taxpayers will benefit from a better understanding of educational needs, greater achievement, and more effective use of public funds.

Long-range planning is not a panacea for every issue facing education or the community at large. There are conceptual and practical problems which have been identified in the literature of business planning as well as the literature of education. These problems are real; substantial efforts are needed to obtain the level of planning which is needed and desirable.

The shortcomings and problems involved in long-range planning must not become a dominant issue or a means of avoiding responsible planning. Neither the concept nor practice of long-range planning will result in the invention of distinctly new problems; rather planning is a means by which current and potential problems can be better identified and more appropriate responses developed for adaptation and use.

Planning Developments

National activities in the area of educational planning include many studies and grants administered by the Department of Health, Education and Welfare and the National Institute of Education, projects of the Education Commission of the States and similar national bodies, studies by the Carnegie Commission, Ford Foundation and other philanthropic or privately funded organizations, and individual activities of various states.

In Oregon, the focus for state-wide planning is on the Oregon Educational Coordinating Commission (ECC). The Commission was created by statute in 1975 to succeed the Oregon Educational Coordinating Council and is required by statute to develop and maintain a state plan for education. The nature, extent, content and methodology of that planning function are left to the Commission to develop with input from other state and local agencies. The chart on page 4 indicates the distribution of planning responsibility among segments and levels of education.

The ECC was created to fill a void in state administration of education and to perform duties which could not be carried out adequately by the Legislature and governing boards. The need for statewide planning in some form was perceived by the Legislature. Defining the precise role and planning procedures of the ECC remains a very difficult task.

The ECC has begun the task of developing and publishing a state plan for education. During the past two years it has produced a statement of comprehensive goals for education. These goals embody a number of principles and legal requirements. We may assume that a state-wide plan will be built upon this basis, although it is difficult to foresee the scope, level of detail, and implications for other agencies and institutions of such a plan. We strongly believe that

LEVELS OF PLANNING RESPONSIBILITY IN OREGON EDUCATION

LEGAL AUTHORITY REGULATION, APPROPRIATIONS*	EXECUTIVE AND LEGISLATIVE						
	EDUCATIONAL COORDINATING COMMISSION						
STATE ADMINISTRATION	State Board of Education	Superintendent of Public Instruction			State Board of Higher Education	Oregon Independent Colleges Association	Assn. of Vocational Schools
	Department of Education Staff						
	Elementary/Secondary Divisions			Community College	Chancellor & Staff		
DISTRICT & INSTITUTIONAL ADMINISTRATION	Local School Boards Superintendent Admin. Staff Faculty Students	ESD Boards Superintendent Admin. Staff - Faculty Students	Private Elem/Sec. Schools Boards Administration Faculty Students	Community College District Boards President Administrative Staff Faculty Advisory Committees Students	College & University Presidents Administrative Staff Faculty Students	Independent Colleges Boards Presidents Administrative Staff Faculty Students	Vocational Schools Board Administration Faculty Students

* Federal activity is pronounced at all levels of education and will strongly affect planning. In relation to state-wide planning, federal involvement is an important factor rather than a specific level of responsibility.

the principal task of the ECC in preparing a state-wide plan is synthesis, coordination, and reinforcement of goals and plans submitted by institutions, districts, and agencies throughout the state. The creative challenge facing the ECC is to establish a process and produce results which embody the commitment and best planning efforts of individuals and organizations. This should be done without eroding local control or imposing significant new administrative and paperwork burdens.

The Department of Higher Education, Department of Education, individual institutions, and local districts must all maintain individual planning functions and coordinate their efforts with one another. The extent of that coordination also falls within the purview of the Coordinating Commission. It is vital that each institution, district, and agency conduct effective long-range planning in support of its mission and purpose. Planning and coordination by the ECC must complement, but cannot replace, local planning.

Each institution or organization must attempt to understand the needs and potential outcomes of planning in terms of its own function. The concepts, elements, and organization of long-range planning must be interpreted and explained so that the planning function can be initiated and carried out in a reasonable fashion. It is important to Oregon's educational institutions that a common understanding of long-range planning be developed and understood throughout the state. This effort can be expedited by a discussion of characteristics of long-range planning and by also pointing out items which should not be considered characteristics of the planning process. This discussion should contribute to the development of sound planning processes in each institution and agency of education.

Definition of Long-Range Planning

In a broad sense, educational planning can be defined as the process by which:

a) Educational needs and goals - state, local, institutional - are identified, evaluated, modified and documented.
b) Missions and policies of educational systems, institutions and districts are defined and prepared.

c) Educational programs and methods are conceived and organized.
d) Financial support and accountability for educational systems and institutions are defined.
e) Specific plans are developed, evaluated and modified on an ongoing basis.
f) Organized attention and resources are directed toward identifying future conditions and preparing responses to them.

This comprehensive concept affects all elements of education and establishes a clear need for a logical, organized and ongoing approach to planning for the future of Oregon education.

Long-range planning must be recognized as a continuing process of institutional management. It is reasonable and appropriate to speak of a planning process in the same sense that one speaks of an accounting process or a budgeting process or an instructional process. The planning process requires commitment and support from the governing authority of an institution, from administrators, from faculty and staff (individually and collectively) and from the public. All affected parties must participate in the process and help define its scope, content and outcomes.

It is important as well to distinguish planning from other responsibilities. Confusion of planning concepts and procedures with other activities is a frequently cited difficulty. The following are some of the elements or matters which should not be considered as part of the long-range planning concept and process:

-planning is not forecasting
-planning is not advance decision making
-planning is not the selection of a rigid or unalterable course of action
-planning is not an activity to be performed by separate staff, then imposed upon an organization
-planning is not simply the production of specific "plans"

Characteristics of good long-range planning:

--long-range planning is a speculative, estimate-based activity involving expectations of possible events over an extended period of time. With reference to Oregon education, we believe long-range planning should involve time horizons of five to ten years.

--planning must incorporate flexibility in terms of alternate ways of responding to possible events. We believe that flexibility results from good planning, not from the avoidance of planning.

--planning represents an organized and consistent means of developing and improving on a continual basis institutional goals and expectations of achievement and performance.

--planning provides a basis for better evaluation and measurement of current operations and performance.

--planning is contingency-oriented. As possible future events are recognized, alternative responses can be developed and selected when needed. Responses need not be invented on the spot as conditions change.

--planning is an ongoing and thorough institutional process from which consistent plans regarding particular activities of the institution can be developed and incorporated into the performance of the institution.

--planning is results-oriented, in terms of specifying desired results for the institution and in terms of producing specific action plans. It is important that the planning process itself be documented as part of the operation of the institution and that the results of planning also be documented.

--planning requires consistent and effective communication among all parties involved. Both public and professional levels of input are vital to educational planning. Public understanding and acceptance of the planning process and its results are essential to planning success. The planning process depends on open and continual communication at all levels.

Much of the difficulty encountered in long-range planning stems from the fact that planning is a diffused process involving many people and simultaneously a structured process which puts activities of individuals and groups in a comprehensive form. It is difficult for individuals to divide their time and attention in terms of "now I'm planning" vs. "now I'm doing something else".

However, such a distinction must be defined and incorporated within each department, school, college, district, and state agency.

In order to insure the conduct of specific planning activities, it is important that schedules and guidelines for planning be developed and adhered to throughout each institution, district and agency. For instance, every school district lives with the discipline that an annual budget must be developed and adopted each year. It is essential that specific planning functions such as the development and review of goals, the development of functional plans, and the review of program changes be conducted on a scheduled and predetermined basis so as to provide a stronger framework for annual budgets and term by term activity plans.

There is an extensive literature devoted to planning for education and other public endeavors as well as for private sector or business organizations. While matters of terminology and emphasis may differ between discussions of planning for education and business, concepts and purposes are largely the same and the literature of business planning can be adapted to the needs of public agencies including education. The bibliography of this report includes numerous articles developed for business organizations as well as for public agencies. These articles provide a broad sampling of materials available for use by those involved in educational planning activities. We encourage institutional, district and state-wide planners to examine fully the range of available materials.

Documents such as the 1972 Interim Education Committee Report to the Oregon Legislature provide ample evidence of long-standing issues and past efforts to effect change. The planning process must be built upon past and current efforts and capabilities.

These planning materials include various other attempts to define planning or elements of the planning process. The following excerpts are not presented as findings of the Committee, but as indications of the intent and perceived scope of long-range planning:

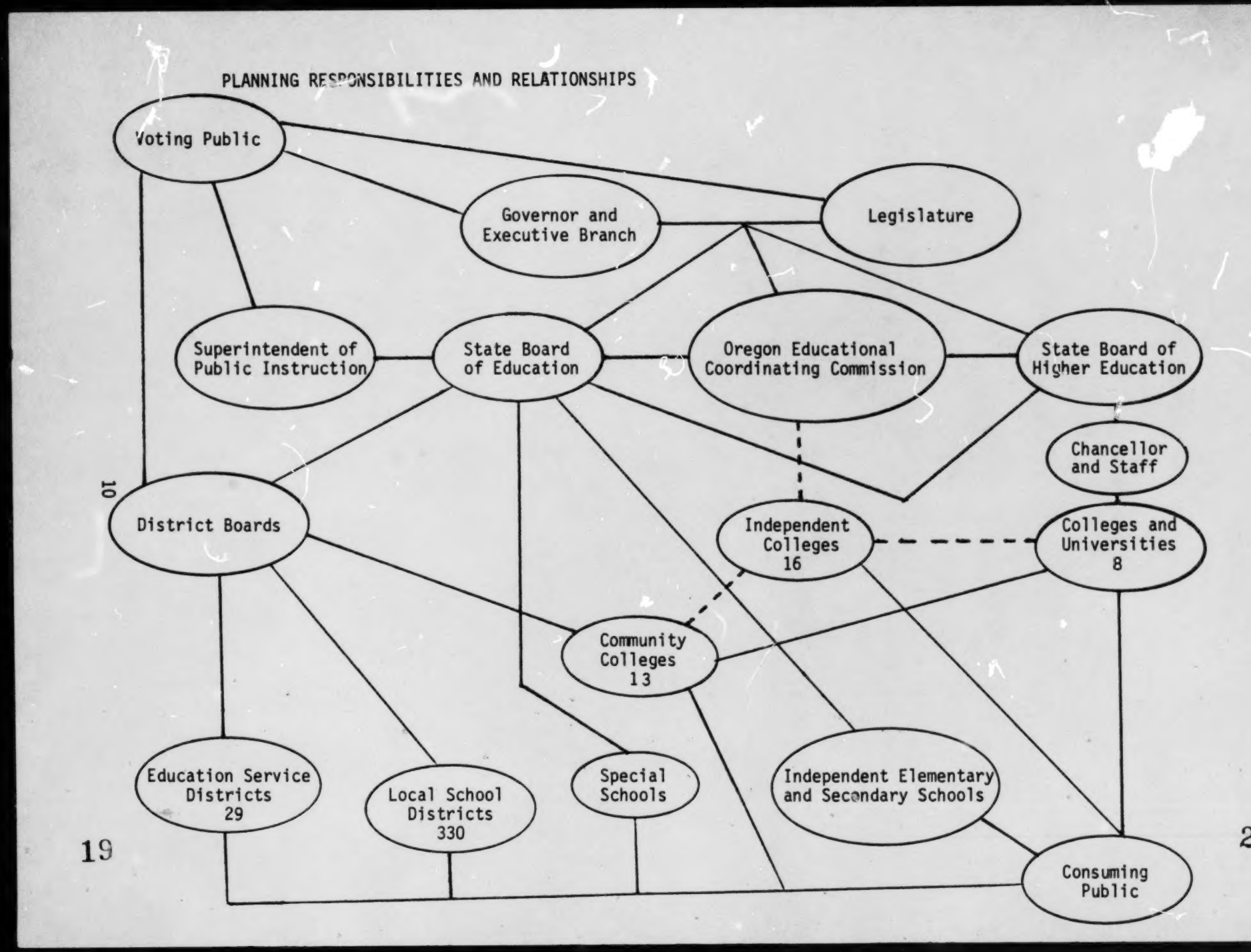
a) planning is the systematic formulation, appraisal and refinement of objectives and decisions on actions necessary to achieve them.
b) Planning is the process of anticipating and preparing for change, and preserving institutional flexibility.
c) planning is the design of a desired future and of effective ways to bring it about.
d) planning is, to a large extent, the job of making things happen which would not otherwise occur.

These points convey a sense that planning is an assertive activity in which institutions and districts seize initiative in determining their future. On the other hand, there are elements of planning which seem clearly to be more reactive to changes initiated by other sources. There is a difference of opinion and philosophy among educators, public leaders, and citizens about whether education should assume a posture of initiative or one of reaction regarding future conditions and possible changes. Planning activities at local and state levels should produce reliable answers to such questions, and this issue must not obscure the need for constructive long-range planning.

Local Planning Responsibility

There are various aspects of educational planning which require examination. Among these are the distribution of planning authority among levels and segments of education, and the application of planning to specific functional areas in education. A comprehensive planning system must include planning activity at the local level in schools, districts and community colleges, activities of state boards and other state agencies, and planning activities and decisions by the Oregon Legislature. Relationships among various groups and institutions are indicated on page 10.

It is important to define specific areas of planning responsibility for each level and segment, and to provide coordination among levels and segments to obtain a cohesive and valuable planning result. As the emphasis on issues and particular problems may differ among locations and levels of responsibility, it is important that planning procedures and schedules be determined for each institution or agency. Some central review is needed to assure reasonable consistency of planning efforts and maximum benefit from the planning process.


PLANNING RESPONSIBILITIES AND RELATIONSHIPS
Voting Public
Governor and Executive Branch
Legislature
Superintendent of Public Instruction
State Board of Education
Oregon Educational Coordinating Commission
State Board of Higher Education
Chancellor and Staff
District Boards
Independent Colleges 16
Colleges and Universities 8
Community Colleges 13
Education Service Districts 29
Local School Districts 330
Special Schools
Independent Elementary and Secondary Schools
Consuming Public

At the local level it is important that the planning activities of schools and districts take into account enrollment projections, financial conditions, facility needs, and curriculum development. District planning should also be conducted in cooperation with other local government agencies. School districts in many cases are significant vehicles of local government with influence going beyond the basic mission of education. The coordinated development of facilities among school districts, city governments, county governments, park districts and other local agencies is an important need in every community.

It is important to citizens and taxpayers that attention also be given to total expenditures of local governments including educational agencies. Coordinated financial planning regarding current budgets, long-term financial affairs, and use of facilities would be a positive and important contribution to improved performance of various governmental units.

Oregon's concept of local control is significant in terms of the management of education and other activities at the local level and in terms of the ability of various agencies to establish a cooperative framework of action. The responsibility accompanying local control is that various governmental units must work together to serve collectively the overall public interest.

The widest range of planning responsibility is found at the local level. It is at this point that decisions on programs, facilities, and basic finances are made and implemented. Planning efforts and contributions at state agency and legislative levels are vital to the success and implementation of local plans and operations, but the direct challenge remains for school districts and other local agencies to establish realistic and fundamental goals, to determine the basic means for achieving those goals, and to give a sense of vitality, mission and support to educational endeavors throughout the state.

Legislative Planning

At the top of the planning pyramid lies the Oregon Legislature itself. Its role in educational planning has several key elements including legislation regarding local districts and state agencies, and educational finance via biennial appropriations.

While it is true that one legislature cannot bind another in terms of legislation or appropriations, it is also true that there are areas of ongoing legislative policy which can be recognized and utilized by state agencies and local districts in their planning activities. It is important that ongoing legislative policies and commitments be clearly identified and understood throughout the state and used as one element of effective planning. Consecutive legislatures should attempt to maintain a consistent perspective on major issues facing education so that legislative change can be reasonably anticipated and provided for throughout the educational community.

The Legislature must improve its role in the management of education and other public services. The political effects of comprehensive planning must be minimized for the benefit of Oregon citizens and our educational institutions. As part of "top management", the Legislature must unequivocally demonstrate commitment and support for effective planning.

Legislative planning must concentrate on the overall and total educational mission of the state. The Legislature must not deal just with the individual components of education and individual budget requests, but must attempt to examine the total commitment to education in terms of required programs and financial support. If the Legislature allows the appropriations process to focus largely on competition for funds between the segments of education then the interests of the state and its taxpayers will be compromised. The roles of various segments and consequent funding of programs, must stimulate and reinforce one another.

The Legislature, acting through its own auspices or through the Educational Coordinating Commission, should establish projections and funding targets for six to ten years in the future. While such targets could only be primary guidelines and would be subject to revision, the process of developing them would greatly benefit state agencies and local districts as they prepare plans and define future actions.

It is also important that the Legislature establish an improved procedure for funding programs at the college/university and community college levels in

order to stimulate more efficient use of facilities throughout the state and to allow joint offering of community college and four-year college programs in areas where that is appropriate. Current funding formulas and procedures greatly inhibit rather than stimulate coordinated program development and facility utilization. Significant questions regarding access to education and equity of program funding can be resolved if such funding problems are eliminated. As an extension of this need it is also important that legislative review be based on a principle of examining state-wide program offerings which transcend the traditional boundaries between elementary/secondary, community colleges and higher education.

Points of Concern

Comprehensive long-range planning also requires that specific areas of planning be carried out in an independent but coordinated fashion. This applies to such areas as long-range financial planning, staff planning, facility planning, curriculum planning, and long-range efforts to evaluate student achievement and educational performance. The search for better planning must proceed on two fronts: first, to develop better methods of functional planning in these areas and second, to develop methods of integrating these specific planning activities into a cohesive educational plan at local and state levels.

Financial planning is a major concern due to the continuing problem of inflation, rapid cost escalation, and the reactions of taxpayers throughout the country. Community and state financial support to education is a matter of considerable uncertainty at the present time. It is not an appropriate response for districts, institutions or state agencies to formulate annual budgets simply on the basis of current conditions. Improvements in long-term financial conditions and in the annual budgeting process require effective planning both for actual dollars and for financial policies. Projection of current costs and expenses cannot be assumed as a reasonable basis for future planning. Improved conditions will emanate from a better formulation of educational goals, and from the continuing search for better ways to achieve those goals in a cost-effective manner. The emphasis on accountability in education and government will continue and will apparently increase the pressure for better identification and management of educational and public service costs.

Problems related to capital investment and development of facilities will continue to be an area of concern for the educational community and the public. Despite current and near-term indications of decreased enrollment it is not too early to begin planning for the next wave of enrollment growth at the primary/secondary level. It is necessary to seek full utilization of current facilities and to preserve facilities which will be needed in the future. Elimination of useable facilities with later replacement at far greater cost may not be prudent. Leasing of presently idle facilities should be considered.

Many public and private organizations are greatly concerned with demographic factors and issues of population growth and distribution. It is important that school districts, as they estimate future student loads, work closely with other organizations to coordinate both the development and analysis of such data.

Evaluation of student performance and the consequent impact upon curriculum organization and planning is a matter of great complexity. The pressure for accountability and improvement is perhaps greatest in this area at the present time. Planning activities related to curriculum and evaluation matters must be based on renewed emphasis on long-term educational goals and a stronger consensus on the educational mission of the state and its communities. This effort requires strong leadership at both the local and state levels. Educational and political leaders must find better means for the determination and achievement of long-range goals. The educational philosophy of the state and various constituencies will continue to be tested and public debate must occur at this level.

Such concern and attention is an integral part of a long-range planning process and the actions of the Educational Coordinating Commission may be of value. The ECC has the opportunity, along with the Legislature, to act as a clearinghouse as well as a development vehicle for the educational goals and policies of the state. The ECC can help translate goals and philosophical issues into actions and decisions by institutions and districts throughout the state.

Emphasis on planning for public education does not diminish the purpose and role of private and independent schools and colleges. Planning activities of public agencies must take account of the established role of independent institutions and public policy regarding them. Both the Legislature and the ECC have clear responsibilities in this area.

In several cases, independent institutions have accomplished effective long-range planning and stand as examples for public education. The ongoing need for planning affects both public and independent institutions and coordination between them will continue to produce mutual benefit.

Educational long-range planning must respond to a variety of public and social issues. These issues will affect not only the general context of education but also the environment and activities within our educational institutions. Possible changes in the life-styles of Oregon citizens and impacts on the social environment within the schools stand out as areas of concern.

The level of individual responsibility which students must assume for their own learning and development continues to be a major issue. Different assessments of this issue lead to significantly different assumptions about school organization and instructional methods. School authorities as well as community and political leaders must become more proficient in examining and responding to these issues and related problems.

Changing roles of teachers and administrators within institutions and changing roles of our educational institutions in society pose additional challenges to all concerned. Such changes affect the training of teachers and administrators as well as the delivery of educational services in our schools and communities.

Comprehensive long-range planning is one means - a necessary one - by which the educational community and the state as a whole can attempt to respond effectively to such issues and problems. Effective planning will improve the entire fabric of educational activity and stimulate renewed emphasis on values, needs and goals for education in Oregon.

Planning responsibilities must not be assigned to a small number of individuals or confined to a limited range of issues. In particular, it is not appropriate to expect budget officers or business managers of institutions to carry out long-range financial planning for an institution or a district. Neither is it proper for building principals or central administrators to carry the major burden of curriculum planning. It is essential that the process involve many individuals representing the full cross-section of interests, experiences and capacities.

The commitment to planning must extend throughout the educational community and efforts to train administrators, faculty members, and other personnel must be initiated on a broad scale. The planning process must then assimilate and refine the efforts of those involved to produce valuable and useable results which can be applied throughout districts and the state as a whole. Planning is a people-oriented process which will succeed only if the educational community, the Legislature, and the public are willing to examine openly the historical trust in education and the commitment to future achievement.

Chapter II
Conclusions and Recommendations

Throughout an extensive series of visitations and meetings the Study Committee has sought to determine the scope of planning activities in the institutions and districts of the state, and to examine the commitment and resources available for effective long-range planning. Several major conclusions have been reached as a consequence of these investigations.

A. Education has examples of long-range efforts, often conducted by individuals with singular capacities for leadership and influence; but consistent, reliable, and broadly applied processes and systems are greatly lacking. Planning activities that do occur are largely ad hoc issue-oriented responses to current problems. Ongoing planning processes with specific schedules and procedures are infrequent.

B. Too few educators and administrators are trained or experienced in the concepts, procedures, and supervision of long-range planning. Planning is not a specified component of either curriculum or certification requirements for school administrators.

C. Districts and institutions are often unable to describe or document planning procedures, schedules, responsibilities, or achievements. Planning in a long-range sense is often seen as a difficult burden and as unlikely to be useful. The educational community is not currently prepared to play an adequate role in defining, preparing for, and participating in the future of education and the elements of change it may contain.

D. There is widespread reluctance on the part of administrators to participate in speculative planning. The committee found that this reluctance arises from perceptions of possible negative consequences, fear of unknown results or repercussions, loss of autonomy or flexibility, and a mistaken belief that organized long-range planning might be useless because of many rapidly changing factors.

E. There is a lack of Board policies at both the local and state levels regarding planning activities and needed performance in this area.

F. The inherent difficulties of planning at the institutional or district level are greatly compounded by problems at the state level such as definition of missions, problems of funding, and difficulty in determining broad educational goals.

G. Opportunities for effective planning for improvements in educational performance and management are currently overshadowed by widespread concern over decreasing enrollments and consequent loss of financial resources. However, these are among the major factors in the need for planning. The lack of enrollment pressure should be seized as an opportunity to direct attention and resources to improvement in the direction and structure of educational programs.

H. Long-range educational planning must deal with results and ways of changing those results, if necessary, in a desirable way. It should become a framework and context for short-term and current activities. Annual budgeting is predominantly a process of making ends (financial and educational) meet, with too little opportunity to examine or re-examine the ends.

I. In response to questions about planning, the Committee has often been told that "everybody plans," and that planning occurs "all the time" as "part of everyone's job." These statements are undoubtedly true in some measure. But the purpose, effect, and product of such planning activity is to ascertain and evaluate.

We believe that conscientious and effective long-range planning in education is a key factor in the search for:

-better financial management and use of resources.
-sustained and measurable inprovement in educational achievement and performance.
-better performance in relation to both specific and total costs.
-increased flexibility in responding to changed conditions.
-improvement in total public benefit and public support.

These conclusions form the basis for the following recommendations which are summarized here for convenience. Please see the indicated pages for further discussion regarding each recommendation.

The recommendations deal with matters of organization and procedure, not the content of plans. They are intended to correct defects, reinforce current strengths and produce effective planning throughout Oregon eduation.

Implementation of the recommendations will not be easy. The committee is aware of various organizational and policy problems which might hinder implementation. However, such problems do not provide a rationale for the avoidance of planning. Members of the committee and FORE staff will assist districts and institutions in acting on the recommendations upon request.

Success in planning will require broad participation by experienced persons in each district and institution. Formulation of plans and the development of planning processes are not tasks which can properly be assigned to new staff members. For this reason as well as the avoidance of increased costs and new positions the emphasis lies on use of current staff and resources and appropriate training. The goals of effective planning and results may justify certain front-end costs, to be offset by the benefits of planning.

Recommendations for Local School Districts and Education Service Districts (ESD)

Recommendation #1 - Written Policy (See Page 26)

We recommend that each of the 330 local boards and 29 ESD boards in the state develop and adopt a written policy statement on long-range planning. This policy statement should commit each district to an ongoing long-range planning process involving the community, the board, district staff and students, and should be communicated to the public.

Recommendation #2 - Process (See Page 26)

We recommend that district superintendents and their staffs begin immediately to develop and secure Board approval of comprehensive long-range planning procedures and appropriate organizational responsibilities. The long-

range planning process should incorporate financial, facility, staff, curriculum and extra-curricular areas and should become a basis for annual operational and budget planning. Such planning processes must be fully implemented by 1980 in order to be effective for the 1981-83 biennium.

Recommendation #3 - Training (See Page 27)

We recommend that explicit steps be taken by Boards, administrators, universities, state agencies, and professional organizations to provide appropriate training for administrators and staff regarding long-range planning and its philosophy, process, and requirements. This effort should be an extension or redirection of current training programs, with responsibilities and costs appropriately distributed.

Recommendation #4 - Documentation (See Page 28)

We recommend that long-range planning processes in all districts over the next three years produce the following documents: 1) a four-year financial plan for each district, 2) four-year staffing plan for each district, 3) ten-year projections and estimates of enrollment loads, 4) five-year goals and plans for curriculum development and instructional improvement, 5) ten to fifteen-year plans for physical facility maintenance and development. A reasonable number of alternatives or contingency responses in each of these areas should be included. Each of these plans should, as a minimum, incorporate current efforts and should include provisions for semi-annual and biennial review and updating.

Recommendation #5 - Financial Impact (See Page 29)

We recommend that long-range planning processes be used as the vehicle for development by each district of an approach to improved financial operations incorporating use of tax bases, serial levies, rate-base levies and other financial arrangements as appropriate.

Recommendations to Education Service Districts (ESD - formerly Intermediate Education Districts - IED)

Recommendation #6 - Service Policy (See Page 31)

We recommend that ESD Boards develop policy statements and procedures for assisting local districts with implementation of long-range planning processes. We believe such assistance is a reasonable service for ESDs to undertake in terms of the resources and capabilities required for effective planning.

Recommendation #7 - Training (See Page 31)

We recommend that superintendents and appropriate staff of Education Service Districts obtain or show evidence of specific training regarding long-range planning both to support ESD activities and to develop the capability for assisting other districts.

Recommendations to the State Board of Education and Department of Education

Recommendation #8 - Performance Standard (See Page 32)

We recommend that the State Board of Education develop, with local board input, an operational standard for local school districts and educational service districts regarding long-range planning procedures and performance within those districts. Such a standard should require local board policy development and organized planning efforts regarding curriculum, staff, facilities, and financial operations.

Recommendation #9 - Goal-setting (See Page 33)

We recommend that the State Board of Education and the Department of Education develop and communicate to all involved parties, including the Educational Coordinating Commission, state-wide goals for elementary and secondary education. These goals should incorporate achievement and performance objectives, financial support objectives, and other objectives required under existing federal and state regulations, and should relate directly to the authority and responsibility of the State Board. The State Board must demonstrate initiative in determining state educational policy and improvements in our educational systems.

Recommendation #10 - Department of Education Planning (See Page 34)

We recommend that the Department of Education, in accordance with State Board of Education policy, establish a long-range planning function for the operation of the Department and assist local districts and ESD's throughout the state. Planning assistance to districts should reinforce local responsibility, control, and performance, and should not be used to increase accountability to the State. Development of a long-range planning capability in the Community College Division for assisting the several colleges should be continued and strengthened.

Recommendation #11 - Equalized Funding (See Page 34)

We recommend that the State Board of Education and the Department of Education, as part of their planning responsibilities, undertake the development of improved means and formulas of equalization funding for elementary and secondary education in the state. Initial attention in this area should be given to disposition of the currently protected but unused portions of ESD taxing authority.

Recommendations to Community College Districts

Recommendation #12 - W[illegible] Policy and Documentation (See Page 35)

We recommend th[illegible]unity college board adopt a comprehensive written policy on [illegible]lanning, similar to and consistent with those proposed for schoo[illegible]ts within each college area. In addition to four-year financial plans, four-year staffing plans, ten-year enrollment projections, five-year curriculum and instruction plans, and ten-year facility plans, each college should develop five-year plans for community service, community education, and vocational-technical programs.

Recommendation #13 - Coordinated Planning (See Page 36)

We recommend that the community colleges, through the Community College Division of the Department of Education and the Oregon Community College Assembly, develop a coordinated long-range planning capability. Major responsibilities of this activity should be the development and

submission to the Coordinating Commission and the Legislature of state-wide community college policy and objectives, and clear definition of college missions and roles.

Recommendations to the State System of Higher Education

Recommendation #14 - Higher Education Goals (See Page 37)

We recommend that the State System of Higher Education prepare written statements of long-range missions, goals and policies for higher education in Oregon. These statements should become the basis of planning and decisions by the ECC and the Legislature for higher education and should be reviewed and updated each biennium.

Recommendation #15 - Institutional Guidelines (See Page 37)

We recommend that the State System of Higher Education develop an improved set of guidelines and institutional goals in order that the mission and specific objectives of each institution be more clearly understood and communicated to the ECC, the Legislature, other agencies and the public. Such guidelines and goals should be prepared and reviewed in a comparative fashion, together with current and projected policies for program allocation and distribution. Particular attention should be given to regional and specialized institutions.

Recommendation #16 - System Planning (See Page 38)

We recommend that a planning group representing each institution of the State System of Higher Education and the Board's office be formed and charged with developing a consistent and effective long-range planning capability for the institutions and the System. A committee of the State Board of Higher Education with authority to supervise the long-range planning procedures of the System and its institutions should also be formed.

Recommendation #17 - Documentation (See Page 39)

We recommend that the State System of Higher Education and each institution develop four-year financial plans, four-year staffing plans, ten-year enrollment projections, five-year curriculum and instructional plans, and

ten-year facility plans. All plans should provide for semi-annual and biennial review and updating. Coordinated and consistent procedures for enrollment forecasting and student clientele analysis should be developed throughout the system.

Recommendations to the Oregon Educational Coordinating Commission (ECC)

Recommendation #18 - Planning Function (See Page 40)

We recommend that the Educational Coordinating Commission organize within itself and its staff a specific long-range planning function and capability. The development of long-range plans by the ECC should be viewed as an ongoing or continuous activity apart from the specialized studies and other activities of the ECC.

Recommendation #19 - Consistent Framework (See Page 40)

We recommend that the Educational Coordinating Commission develop and seek acceptance of a consistent planning framework for use by educational agencies and institutions throughout the state. The Commission should coordinate the general content of segmental and institutional plans and establish annually a planning schedule and calendar which reflects the needs of institutions, boards and the Legislature.

Recommendation #20 - Decentralized Emphasis (See Page 41)

We recommend that in reviewing and further developing statewide goals and objectives for education, the Educational Coordinating Commission commit itself to a process of synthesizing and building upon objectives and goals submitted by other boards and institutions. The ECC should stimulate effective long-range planning throughout the state, coordinate procedures, and summarize and comment upon planning results.

Recommendation #21 - Information Base (See Page 41)

We recommend that the Educational Coordinating Commission continue to develop and maintain a common and broad base of educational information which can be used to support planning functions at various levels throughout the state.

Recommendation #22 - Additional Goals (See Page 42)

We recommend that the Educational Coordinating Commission in cooperation with the Boards of Education and Higher Education, develop state-wide goals and objectives for long-range financial support of education and for state-wide program review and evaluation on an intersegmental basis.

Recommendations to the Executive Department - State of Oregon

Recommendation #23 - Policy (See Page 42)

We recommend that the Executive Department adopt a written policy statement on long-range planning for state services, particularly education. Such a policy should support policies adopted by state education agencies and should specify that long-range planning procedures be applied to new budget procedures such as the Alternate Program Levels System.

Recommendation #24 - Funding (See Page 43)

We recommend that the Executive Department support specific allocation of funds for comprehensive planning in the budgets of state agencies and institutions.

Recommendations to the Oregon Legislature

Recommendations #25 - Policy (See Page 43)

We recommend that the Oregon Legislature make long-range planning for education a matter of legislative policy. The Legislature should apply concepts and procedures of long-range planning in its deliberations and should support allocation of funds for planning in agency and institutional budgets. Particular attention should be given to long-range financial projections and targets.

Recommendation #26 - Funding Methods (See Page 44)

We recommend that the Oregon Legislature develop improved funding methods which will facilitate co-ordinated and more efficient development and use of educational facilities throughout the state. Problems of tax support and reimbursement for programs should not impede such use.

Recommendation #27 - Facility Needs (See Page 45)

We recommend that the Oregon Legislature provide for long-term maintenance and development of facilities which will be needed to meet anticipated future enrollment loads of state institutions.

CHAPTER III

Discussion of Recommendations

Recommendations to Local School Districts and Education Service Districts - ESD

Recommendation #1 - Written Policy

We recommend that each of the 330 local boards and 29 ESD boards in the state develop and adopt a written policy statement on long-range planning. This policy statement should commit each district to an ongoing long-range planning process involving the community, the board, district staff and students, and should be communicated to the public.

Local boards are responsible for a broad range of planning activities, for decisions which affect the educational careers of all students in the state, and for the expenditure of large sums of tax money. In accordance with this responsibility, policies and procedures for long-range planning must carry the full authority and commitment of each school board.

Effective long-range planning at the district level will provide a strong basis for the pattern of annual activities and responsibilities carried out by each board. Implementation of this recommendation will provide assurance that planning for Oregon education, and for the benefits it should confer, will occur on a broad and responsive basis. Actions of state agencies and the Legislature may alter and perhaps ease some of the burdens facing local boards. Nonetheless, the direct challenge remains at this level and conscientious and effective action is needed soon. Policy statements must not be sterile formalities in response to administrative rules; they can be the basis for renewed and vigorous action at the community level.

Recommendation #2 - Process

We recommend that district superintendents and their staffs begin immediately to develop and secure Board approval of comprehensive long-range planning procedures and appropriate organizational responsibilities. The long-range planning process should incorporate financial, facility, staff,

curriculum and extra-curricular areas and should become a basis for annual operational and budget planning. Such planning processes must be fully implemented by 1980 in order to be effective for the 1981-83 biennium.

The conduct and supervision of planning processes and the implementation of Board policy lie within the professional responsibility of district staffs. Development planning procedures must be undertaken at the staff level utilizing task force or committee organizations which broadly represent district personnel and functional responsibilities. A comprehensive planning process requires the conduct of specialized planning in various functional areas which must be coordinated and integrated to form a cohesive overall plan. Each step or level of the planning process must provide for periodic review and update activities in accordance with the time horizons indicated throughout the report.

It must be recognized that this recommendation calls for planning involvement and performance on the part of current district staff and administrators. The recommendation must not be used as the basis for increases in staff or budget levels within districts.

Specific allocations to support long-range planning will be needed as well as allocation of staff time. The need is for proper use of current resources rather than for acquistion of additonal funds and staff. With appropriate training individual and group capabilities to undertake this task exist in the districts of the state and must be effectively applied.

Patterns of citizen involvement established over the last decade provide a basis for community participation in planning. Public support for long-range goals is extremely important. Goal development should involve recognition of community philosophies and provide for public participation. The need for greater communication between individuals, community organizations, and the schools is evident.

Recommendation #3 - Training

We recommend that explicit steps be taken by Boards, administrators, universities, state agencies, and professional organizations to provide appropriate training for administrators and staff regarding long-range

planning and its philosophy, process, and requirements. This effort should be an extension or redirection of current training programs, with responsibilities and costs appropriately distributed.

Successful long-range planning will depend upon the talents, abilities, and experiences of many people. The development and ongoing application of planning processes will also require specialized training for administrators, board members, and other staff members if they are to contribute most effectively. It is not enough to request that people throughout districts or institutions participate in planning activities. The planning process must be carefully structured and organized in both technique and scheduling.

There are relatively few individuals in education, public service or the private sector who can be considered experts in the area of long-range planning. It is inappropriate to expect that district superintendants, staff members and citizens should automatically be proficient in specialized planning procedures. Training in long-range planning will be necessary at various levels and must be incorporated within the variety of training and inservice opportunities available to educators.

Programs for training and certification of school and college administrators should properly incorporate various management functions which these individuals will be expected to perform. Planning belongs in that group of functions and should be a common element of such programs. Faculty members, as they must participate in planning activities, should also acquire training in this area.

A concerted effort on the part of Schools and Departments of Education, the State Department of Education, school districts and other agencies will be necessary in order to provide the variety of needed training opportunities.

Recommendation #4 - Documentation

We recommend that long-range planning processes in all districts over the next three years produce the following documents: 1) a four-year financial plan for each district, 2) four-year staffing plan for each district, 3) ten-year projections and estimates of enrollment loads, 4) five-year

goals and plans for curriculum development and instructional improvement, 5) ten to fifteen-year plans for physical facility maintenance and development. A reasonable number of alternatives or contingency responses in each of these areas should be included. Each of these plans should, as a minimum, incorporate current efforts and should include provisions for semi-annual and biennial review and updating.

The point has been stressed repeatedly that long-range planning must be considered as an ongoing process which supports overall management of education. This point is in contrast to the concept of planning as an erratic activity to be invoked when and if there is a need to produce some kind of plan. The stress upon planning as an ongoing process also provides the basis for defining the kinds of planning documents which should be produced by the process. The plans and documents specified in this recommendation will provide a basis for annual budgeting and operations and for instituting specific changes needed for achievement of long-range goals.

These plans must reinforce one another to form a comprehensive plan and provide a sense of direction for each district and institution. Specific plans must also be kept as brief and concise as possible. The purpose of planning is not to produce books or lengthy treatises but to provide a solid and useful basis for decisions and actions. Statements of goals and needs, the analysis of alternatives, and the selection of responses must be facilitated and simplified.

Recommendation #5 - Financial Impact

We recommend that long-range planning processes be used as the means for development by each district of an approach to improved financial operations incorporating use of tax bases, serial levies, rate-base levies and other financial arrangements as appropriate.

Current and future financial support for education is a matter of great concern throughout Oregon and the nation. Questions about tax levies, tax bases, bonding and taxpayer revolt must be dealt with from a sound position. In recent years many districts and institutions have apparently had little choice but to respond to immediate pressures on budgets and tax levies. These problems and pressures will not disappear quickly. But improvements in educational finance and expenditure control can be realized from improved long-range financial

planning and efforts to prepare for future contingencies. Comprehensive planning and an emphasis on financial planning will provide a necessary means of formulating better financial objectives and financial support in school districts throughout the state.

Recommendations to Education Service Districts (ESD formerly Intermediate Education Districts - IED)

Recommendation #6 - Service Policy

We recommend that ESD Boards develop policy statements and procedures for assisting local districts with implementation of long-range planning processes. We believe such assistance is a reasonable service for ESD's to undertake in terms of the resources and capabilities required for effective planning.

The creation of Education Service Districts by the 1977 Oregon Legislature may be an important step for educational management in the state. Through the years, county education offices evolved first into Intermediate Education Districts and now service districts with roles and missions which have not been clearly understood. There is now an opportunity to reexamine the roles of ESD's and to develop a more consistent service and support position.

Since Education Service Districts no longer have the burden of tax equalization, their resources, attention and efforts can be devoted to other problems of school management. Various ESD's have developed programs to assist local school districts in purchasing, special education programs, transportation and other areas. It is certainly appropriate that ESD's develop a specific capacity and role in assisting in the long-range planning activities of districts they serve.

Recommendation #7 - Training

We recommend that superintendents and appropriate staff of Educational Service Districts obtain or show evidence of specific training regarding long-range planning both to support ESD activities and to develop the capability for assisting other districts.

As in the case of local districts, directors and staff members of ESD's will benefit from specific training in long-range planning. This will be needed first to conduct planning for the operations of the ESD's themselves and

second to provide the capacity to assist board members, administrators and staff members of local districts.

It is important that local districts not only carry out effective planning for their own operations but also coordinate that planning with other local jurisdictions and nearby districts. The activities of ESDs can be of great benefit in this area and ESD staff members should acquire the training and background to assist strongly in this activity.

Recommendations to the State Board of Education and Department of Education

Recommendation #8 - Performance Standard

> We recommend that the State Board of Education develop, with local board input, an operational standard for local school districts and educational service districts regarding long-range planning procedures and performance within those districts. Such a standard should require local board policy development and organized planning efforts regarding curriculum, staff, facilities, and financial operations.

The Board has established management standards for financial operations, accounting, facilities, attendance, and other matters related to school law and financial support. The Board has also established standards regarding curriculum development and review. Adoption of minimum competencies has made the area of curriculum policy and goal setting considerably more visible. This recommendation would have the Board establish an additional standard affecting the entire direction and future orientation of districts throughout the state. The State Board can play a significant role in seeing that long-range planning policies and procedures are developed and implemented throughout the state and that planning results are made available to the general public and the educational community. State Board action in adopting such a standard will also commit the Board, the State Department and other entities to a position of supporting and participating strongly in planning efforts at both the local and state level.

The State Board faces problems similar to that of local boards in the sense that Board agendas are frequently dominated by matters of immediate concern

and matters requiring public disposition. But the State Board must establish a position of long-range concern and effective planning with appropriate policy support.

Recommendation #9 - Goal-setting

We recommend that the State Board of Education and the Department of Education develop and communicate to all involved parties, including the Educational Coordinating Commission, state-wide goals for elementary and secondary education. These goals should incorporate achievement and performance objectives, financial support objectives, and other objectives required under existing federal and state regulations, and should relate directly to the authority and responsibility of the State Board. The State Board must demonstrate initiative in determining state educational policy and improvements in our educational systems.

The process of developing, refining, communicating, reviewing and achieving educational goals is central to planning. As planning activities may vary in form or content from local to state levels, so may the scope and direction of goals. The State Board of Education should develop, adopt and promulgate state-wide goals for elementary and secondary education. The Legislature and the ECC will be involved in this process as well and state-wide goals must be consistent with the variety of goals adopted by local districts. Among state agencies, the State Board of Education is closest to the operation and supervision of education throughout the state. Development and policy support of state-wide goals can best be accomplished at the State Board level.

Such action by the State Board will also contribute to the comprehensive planning efforts of the Educational Coordinating Commission. The ECC's role should be largely one of drawing upon the efforts of other agencies and formulating a consistent and comprehensive plan for consideration by the Legislature and educational systems. It is appropriate that basic goals and objectives for each segment be submitted to the Commission in this case by the State Board of Education. Direct participation in long-range planning by the State Board will also strengthen the Board's position as a policy-making body for the state.

Recommendation #10 - Department of Education Planning

We recommend that the Department of Education, in accordance with State Board of Education policy, establish a long-range planning function for the operation of the Department and assist local districts and ESD's throughout the state. Planning assistance to districts should reinforce local responsibility, control, and performance, and should not be used to increase accountability to the State. Development of a long-range planning capability in the Community College Division for assisting the several colleges should be continued and strengthened.

The Department of Education is extensively involved in efforts to assist local school districts in a variety of ways ranging from financial matters to curriculum development, special education programs, transportation, etc. Long-range planning should be made part of the operations of the Department and resources and experience made available to local districts to assist their planning efforts.

As the Legislature, the ECC and the State Board adopt and alter state educational policy, the Department is the proper vehicle for communicating such developments to districts throughout the state and providing assistance in determining long-term effects. This need reinforces the planning role of the Department and its relationship to planning in local districts.

The boundary between local planning responsibility and state planning responsibility is anything but clear. Local districts and state agencies should keep their planning efforts reasonably broad yet remain sensitive to the responsibilities and functions of other organizations. The State Department can play an important role in resolving conflicts and in helping to coordinate planning efforts and results.

Recommendation #11 - Equalized Funding

We recommend that the State Board of Education and the Department of Education, as part of their planning responsibilities, undertake the development of improved means and formulas of equalization funding for elementary and secondary education in the state. Initial attention in this area should be given to disposition of the currently protected but unused portions of ESD taxing authority.

The 1977 Oregon Legislature made a significant change in school finance by removing the responsibility for equalization funding from Intermediate Education Districts and treating equalization as a state responsibility. Part of that change was an interim measure and further changes are anticipated in the 1979 session. That part of IED tax authority which funded equalization has been protected through the 1979 session although IED's (now ESD's) will not levy that portion in 1978-79. A decision must be made about disposition of that portion of ESD taxing authority. That taxing authority can be allowed to expire, transferred to local districts or made part of state taxing authority in some form. While expiration of that taxing authority would certainly be a popular decision, the overall effect on educational policy and state finances must be examined fully. The State Department and the State Board can properly play a role in this matter. State finance for elementary and secondary education is an area in which the State Board should initiate policy and make appropriate recommendations to the Legislature.

Recommendations to Community College Districts

Recommendation #12 - Written Policy and Documentation

We recommend that each community college board adopt a comprehensive written policy on long-range planning, similar to and consistent with those proposed for school districts within each college area. In addition to four-year financial plans, four-year staffing plans, ten-year enrollment projections, five-year curriculum and instruction plans, and ten-year facility plans, each college should develop five-year plans for community service, community education, and vocational-technical programs.

Much of the planning activity in Oregon's community colleges in the past two decades has been dominated by construction and initial growth. As the colleges complete their development programs and mature in terms of programs and relations with other institutions, the needs and purposes of long-range planning also change. The colleges now face the same needs for long-range planning as do other districts and institutions. These needs are expressed in terms of program maintenance and general management rather than construction and growth.

In addition, one of the planning themes in school districts, community college districts and higher education institutions will be that of defining better

ways to articulate programs and provide improved education for individual students. This will entail review of the missions and roles of districts institutions as well as matters of curriculum, finance and transferability of credits.

Community colleges continue to have a unique role in terms of community education, community service, and vocational/technical training. These are areas in which long-range planning requires special emphasis for the community colleges. Community education and community service are areas where the colleges have yet not developed definitive policies and program guidelines. These are matters which should be addressed within the long-range planning processes of the colleges. As discussed in recommendation #4, specific functional area plans in the community colleges need to be coordinated to produce comprehensive institutional plans which can be communicated to the community and to state agencies. Planning by the community colleges must also be coordinated with a variety of other governmental and service districts in order to assure overall efficient and proper allocation of community resources and funds.

Recommendation #13 - Coordinated Planning

> We recommend that the community colleges, through the Community College Division of the Department of Education and the Oregon Community College Assembly, develop a coordinated long-range planning capability. Major responsibilities of this activity should be the development and submission to the Coordinating Commission and the Legislature of statewide community college policy and objectives, and clear definition of college missions and roles.

The community colleges have taken steps to begin the process of long-range planning within their institutions. They are being assisted by the Community College Division of the Department of Education. The colleges have also participated with the Division in developing a capital appropriations plan which is being reviewed by the ECC following acceptance by the State Board of Education. These developments provide a positive basis on which to build long-range planning processes within and among the community colleges.

The colleges, individually and as a group, also have the important task of reviewing and further defining their overall mission. Mission statements, related objectives and goals must be communicated to the State Board, the ECC

and the Legislature. It is also important that planning efforts be coordinated between the community colleges and other segments of education. The Community College Division can continue to play a major role in facilitating such coordination. The Oregon Community College Assembly, as an arm of the community colleges, should also be utilized to the fullest extent.

Recommendations to the State System of Higher Education

Recommendation #14 - Higher Education Goals

We recommend that the State System of Higher Education prepare improved written statements of long-range missions, goals and policies for higher education in Oregon. These statements should form the basis of planning and decisions by the ECC and the Legislature for higher education, and should be reviewed and updated each biennium.

In its role as governing body and advocate for Oregon's colleges and universities, the Board of Higher Education must continually maintain a strong sense of direction for public higher education. Statements of mission and long-range goals are public expression of the Board's position and provide a basis for development and review of institutional missions and guidelines.

The ECC and the Legislature should interpret and comment on such mission and goal statements rather than initiate goals and impose them on the Board of Higher Education and the institutions of the State System. In its coordinating role the ECC may need to request modification of goals by the State System and by the Department of Education. The task of the ECC will become less complex as the definition of goals by each segment becomes more complete.

Changing financial conditions, demographic factors, and social changes will all increase the need for greater public accountability and stronger planning by the State System. The institutions, as well as the public and other agencies, will benefit.

Recommendation #15 - Institutional Guidelines

We recommend that the State System of Higher Education develop an improved set of guidelines and institutional goals in order that the mission and specific objectives of each institution be more clearly understood and

communicated to the ECC, the Legislature, other agencies and the public. Such guidelines and goals should be prepared and reviewed in a comparative fashion, together with current and projected policies for program allocation and distribution. Particular attention should be given to regional and specialized institutions.

Guidelines and goals for the various institutions are the internal basis for planning by the State System. While development of guidelines is partly an institutional responsibility, the State Board must review and adopt the guidelines and maintain appropriate allocations of programs and funds.

The State Board and the institutions have been revising and updating institutional guidelines but further improvements are needed. The process of review and updating should be formalized and regularly scheduled. Modification of specific institutional goals should occur consistently and should be coupled with biennial policy and budgeting processes.

The missions and goals of each institution must be more clearly defined and stated in terms which can be directly applied to program evaluation, student achievement, state and regional need analysis, and budgetary support. This will be a difficult task for the institutions and the State Board, but more difficult and risky if left to the Legislature, the ECC, and the public directly.

Recommendation #16 - System Planning

We recommend that a planning group representing each institution of the State System of Higher Education and the Board's office be formed and charged with developing a consistent and effective long-range planning capability for the institutions and the System. A committee of the State Board of Higher Education with authority to supervise the long-range planning procedures of the System and its institutions should also be formed.

Academic and physical planning has occurred at each institution of the State System. The Chancellor and his staff have been consistently involved in development of recommendations to the State Board. By national standards, the State System has done a commendable job of developing Oregon's system of higher education.

Nonetheless, the State System, along with the community colleges and public school districts, must institute a thorough and consistent long-range planning process. Problems of program and resource allocation, geographical distribution and finance will be more complex in the future requiring improved methods of response.

An inter-institutional planning group can provide consistent planning procedures throughout the State System and can apply adequate resources to develop a sound planning process. A State Board committee on long-range planning will focus the Board's attention and responsibility. Although specific planning decisions would be within the jurisdiction of current State Board committees, the Board should consider appointing another committee to oversee the entire process of long-range planning for the State System.

Recommendation #17 - Documentation

> We recommend that the State System of Higher Education and each institution develop four-year financial plans, four-year staffing plans, ten-year enrollment projections, five-year curriculum and instructional plans, and ten-year facility plans. All plans should provide for semi-annual and biennial review and updating. Coordinated and consistent procedures for enrollment forecasting and student clientele analysis should be developed throughout the system.

For higher education and other segments of education there is an immediate need to establish planning horizons beyond one biennium. The documents specified, and the planning process which produces them, will provide a reliable means of anticipating future conditions throughout each institution and the State System as a unit. The ongoing nature of planning and regular updating of plans are critically important features.

Procedures for enrollment forecasting and student analysis should be made more consistent among State System institutions and also among the community colleges. Changes in demographic characteristics in various institutions are likely to become more pronounced, with greater impact on institutional policies, programs, and goals.

Recommendations to the Oregon Educational Coordinating Commission (ECC)

Recommendation #18 - Planning Function

> We recommend that the Educational Coordinating Commission organize within itself and its staff a specific long-range planning function and capability. The development of long-range plans by the ECC should be viewed as an ongoing or continuous activity apart from the specialized studies and other activities of the ECC.

Largely due to legislative direction, planning activities have not been a dominant part of the ECC's initial work plans. As the ECC devotes more resources and time to state-wide planning, changes in committee and staff alignment may be indicated.

If state-wide planning is to be a major part of the ECC's activities, then organizational structure and assignments should reflect that emphasis. ECC staff members will be expected to have expertise in long-range planning, both to carry out planning functions and to assist other agencies and institutions. Training opportunities recommended for school and college personnel would also be appropriate for ECC personnel.

Recommendation #19 - Consistent Framework

> We recommend that the Educational Coordinating Commission develop and seek acceptance of a consistent planning framework for use by educational agencies and institutions throughout the state. The Commission should coordinate the general content of segmental and institutional plans and establish annually a planning schedule and calendar which reflects the needs of institutions, boards and the Legislature.

Adoption of firm policies and application of planning processes in Oregon's educational institutions is the most important step. The value of planning at all levels will be enhanced if similar procedures, definitions and schedules are employed among segments and institutions. The ECC should begin immediately to encourage district and institutional planning, and to define common planning elements and procedures.

To assure that long-range planning contributes effectively to program and budget decisions for the 1981-83 biennium and part of the 1979-81 biennium, the

ECC should develop and publish a comprehensive planning calendar for the period 1978-81. Annual review of the planning calendar should be specified.

The ECC, in cooperation with the governing boards and other agencies, should consider sponsoring a series of planning workshops throughout the state. These can be an effective means of stimulating training and participation in long-range planning, and informing local individuals and groups about state-wide issues, planning developments, and the general planning calendar.

Recommendation #20 - Decentralized Emphasis

> We recommend that in reviewing and further developing state-wide goals and objectives for education, the Educational Coordinating Commission commit itself to a process of synthesizing and building upon objectives and goals submitted by other boards and institutions. The ECC should stimulate effective long-range planning throughout the state, coordinate procedures, and summarize and comment upon planning results.

This recommendation recognizes once again that the principal responsibility for long-range planning remains at the district and institutional level. The planning role of the ECC will be sounder and more responsive as the quality of local and institutional planning improves. Major issues and problems will affect all levels and segments of education and consistently effective responses will depend upon proper distribution of planning responsibility and performance.

This recommendation and others are consistent with ORS 348.725 which specifies the comprehensive planning duties of the ECC. (See Appendix A) It is important to stress that decentralized planning responsibilities are a sound and logical basis for necessary and responsible planning, not merely a matter of compliance.

Recommendation #21 - Information Base

> We recommend that the Educational Coordinating Commission continue to develop and maintain a common and broad base of educational information which can be used to support planning functions at various levels throughout the state.

This recommendation in fact restates part of ORS 348.715 which establishes various ECC functions. The ECC has been active in defining and collecting educational data and has worked with governing boards and institutions to generate comparable and standardized information.

It should be stressed that the ECC's information functions are a vital element in effective planning at both state and local levels. Efforts to provide information directly applicable to the long-range planning process should be maintained and strengthened.

Recommendation #22 - Additional Goals

We recommend that the Educational Coordinating Commission, in cooperation with the Boards of Education and Higher Education, develop state-wide goals and objectives for long-range financial support of education and for state-wide program review and evaluation on an intersegmental basis.

Long-range financial planning is one of the major activities which must be accomplished by districts, institutions, and agencies throughout Oregon. Whether or not the laws governing school finance are changed, lack of financial planning can only lead to greater difficulty and loss of public trust and support.

Long-term financial policies and objectives are badly needed at local and state levels. The ECC has the responsibility to initiate and coordinate the development of policies and objectives, and to formulate recommendations to the Legislature.

Many educational programs can be examined not only at the institutional level, but also as broad state-wide programs allocated among segments and institutions. Such state-wide review and evaluation would provide a focus on total resource allocations, student needs, and public benefits. Goals and objectives for overall program review should be developed as part of the ECC planning function.

Recommendations to the Executive Department - State of Oregon

Recommendation #23 - Policy

We recommend that the Executive Department adopt a written policy statement on long-range planning for state services, particularly education. Such a policy should support policies adopted by state education agencies and should specify that long-range planning procedures be applied to new budget procedures such as the Alternate Program Levels System.

The State Executive Department can facilitate the development of long-range planning in education in several ways. Adoption of policies regarding the direct activities of the Executive Department will assure that long-range

planning will affect the process of state budget development and become part of the standard management processes of state agencies and institutions.

As the Executive Department develops improved budget systems, the role and purpose of long-range planning should be incorporated. New systems must be designed in a fashion compatible with the planning processes of the state's institutions. Educational governing boards and institutions must begin planning now for expected conversion to the Alternative Program Levels System or modifications of that system which may be initiated in the next several years. Continued support for long-range planning from the Executive Department will be important to the success of planning efforts throughout the state.

Recommendation #24 - Funding

We recommend that the Executive Department support specific allocation of funds for comprehensive planning in the budgets of state agencies and institutions.

Long-range planning is an essential management activity of Oregon's educational institutions and districts. It needs continued commitment and support within each district and institution and must be recognized as a specific part of the total operation in each case. The planning process requires thorough organization, scheduling, and allocation of staff time and needed resources. Whether institutions operate under program budget formats or line item budgets, it is appropriate that allocated resources for long-range planning be identified in each budget and that budgetary allocations be accepted and supported by the Executive Department and Legislature.

Recommendations to the Oregon Legislature

Recommendation #25 - Policy

We recommend that the Oregon Legislature make long-range planning for education a matter of legislative policy. The Legislature should apply concepts and procedures of long-range planning in its deliberations and should support allocation of funds for planning in agency and institutional budgets. Particular attention should be given to long-range financial projections and targets.

It is important that the Legislature take specific action to indicate its support for and involvement in long-range planning for education throughout Oregon. Legislative actions clearly will impact planning activities and decisions in all institutions and at all levels of education. Planning initiated now will affect budgeting and appropriation processes in future bienniums and will provide a basis for improved decisions at institutional and legislative levels. Budgetary allocations for long-range planning in state institutions will be an important stimulus for planning in each institution.

In the area of financial planning, the Legislature should consider the effect on local budgets of changes and new programs mandated by state authorities. Such programs frequently are required without additional state funds for implementation.

The capital appropriations process employed in recent sessions of the Legislature may serve as a model for other long-range planning efforts. It is feasible to identify long-range needs, resources, and alternative actions in other areas as well.

Recommendation #26 - Funding Methods

> We recommend that the Oregon Legislature develop improved funding methods which will facilitate co-ordinated and more efficient development and use of educational facilities throughout the state. Problems of tax support and reimbursement for programs should not impede such use.

There are many locations in the state where joint use of facilities by local districts, community colleges, and/or four-year institutions would be reasonable and appropriate. Problems of ownership and authorized reimbursement for use present practical and legal impediments. Access to various educational programs could be enhanced throughout the state by efficient, cooperative use of present and future facilities. Issues of inequity of tax support and procedures for cost-sharing and reimbursement require legislative consideration and action.

Such action, together with review of state-wide program access and greater inter-segmental cooperation, can provide greater educational benefits to Oregon citizens. Future costs from this approach will be less than if current policies and conditions are allowed to continue.

Recommendation #27 - Facility Needs

We recommend that the Oregon Legislature provide for long-term maintenance and development of facilities which will be needed to meet anticipated future enrollment loads of state institutions.

One dilemma in the capital appropriations process arises from the need to control current expenditure levels and to reduce long-term costs of facilities. As the state and educational institutions improve enrollment projections and long-range financial planning, the process of facilities management will also improve.

The Legislature must remain aware of current and future needs and anticipated costs. Development of needed facilities requires a long-range perspective on funding, facility use, and physical planning.

failed to repay the principal sum of any loan specifically guaranteed by the appropriation made by this subsection.
[Formerly 351.665; 1967 c.335 s.41; 1967 c.430 ss.6, 7; 1969 c.573 s.4; 1975 c.520 s.5]

348.575 Crediting of late loan repayments. The amount of any loan payments that are paid after the State Scholarship Commission has disbursed funds from any guaranty funds under its jurisdiction to reimburse a lending institution which the lendee has failed to repay on time shall be credited to the guaranty funds, the Student Loan Guaranty Fund or the appropriation under subsection (3) of ORS 348.570 respectively, from which the reimbursement was made.
[1969 c.573 s.2]

348.580 Use of gifts or funds received by commission. All gifts or scholarship grant funds received by the commission shall be placed in the hands of the State Treasurer, who is designated as the custodian thereof and who may hold, in the manner provided by law, the principal and interest on the gifts and grants. Funds may be withdrawn periodically by the commission to make payments upon scholarships awarded by the commission.
[Formerly 351.670; 1967 c.335 s.42]

348.590 Continuous appropriation of certain funds. All funds for and relating to scholarships received by the State Scholarship Commission pursuant to federal grant or from any other source, except moneys appropriated from the State Treasury for a specified period of time, hereby are continuously appropriated to the commission for the purposes for which such funds were provided and received by the commission.
[Formerly 351.672]

348.600 Rules and regulations. In accordance with any applicable provisions of ORS chapter 183, the commission may make such reasonable rules and regulations as are necessary or proper to carry out the provisions of ORS 348.210 to 348.250 and 348.505 to 348.600.
[Formerly 351.675]

348.610 [1967 c.430 s.8; repealed by 1971 c.577 s.3]

348.620 Loan cancellation insurance. (1) The State Scholarship Commission may obtain loan cancellation insurance for any person holding a loan under this section and ORS 348.505 to 348.530 and 348.570.

(2) Such insurance shall insure the life of the student who borrows under this section and ORS 348.505 to 348.530 and 348.570 for the amount of the principal and interest due on the loan and the State of Oregon shall be named as the beneficiary. If the borrower dies before repaying the loan, the insurance shall be used to pay the balance of the loan and the commission shall issue a satisfaction of the obligation.

(3) The Executive Department shall procure bids for the purchasing of insurance in compliance with the laws governing the purchase and furnishing of services to state agencies.
[1967 c.430 s.9; 1971 c.577 s.2]

OREGON EDUCATION COORDINATING COMMISSION (Administration)

348.705 Definitions for ORS 348.705 to 348.825. As used in ORS 348.705 to 348.825, "commission" means the Oregon Educational Coordinating Commission created by ORS 348.715.
[Formerly 351.265]

348.715 Oregon Educational Coordinating Commission; membership; confirmation; advisory committees; compensation and expenses; rules. (1) There hereby is created the Oregon Educational Coordinating Commission. The Governor shall appoint to the commission seven members to serve for terms of four years. Appointments of members to the commission by the Governor are subject to confirmation by the Senate in the manner provided in ORS 171.560 and 171.570.

(a) The appointments shall include representatives of the general public who are not employed by, do not operate or do not serve on the governing board of, any educational institution or agency.

(b) Persons appointed to the commission shall be representative of the general population of the state.

(c) No person appointed to the commission shall serve more than two consecutive terms, or a maximum of eight years.

(2) The commission shall appoint an advisory committee which shall assist the commission in identifying the issues, problems and alternative solutions which are critical to the effective coordination of education. Membership of the advisory committee shall include representatives of

all segments of education, including administrators, students and faculty.

(3) The commission may appoint such other subcommittees or advisory committees as it deems necessary.

(4) The commission shall:

(a) Develop, implement and monitor a comprehensive and standardized state-wide data system capable of yielding information basic to policy formation by governing boards and appropriate govenmental bodies.

(b) Design, implement and maintain a system which will identify the needs and expectations for educational services.

(c) Develop and propose state-wide educational policy and program objectives consistent with identified educational needs; assess the budgetary priorities of the educational segments to identify their consistency with state-wide policy and program objectives; advise the Governor of inconsistencies and omitted areas prior to his action on budget requests; and advise the Legislative Assembly of inconsistencies and omitted areas prior to its action on budget requests.

(d) Develop and propose systems for achieving stated educational policy and program objectives, and review all proposed new and existing post-secondary programs and proposed new post-secondary locations for consistency with state-wide policy and program objectives.

(e) Evaluate educational programs to determine the extent to which well-identified educational needs are being met.

(f) Evaluate the effectiveness of educational planning efforts, and provide for their appropriate modification.

(g) Assure that an equitable distribution of special resources is made to the various educational segments through the administration of interinstitutional state and federal programs as assigned by the Governor or the legislature.

(h) Monitor proceedings of all meetings of the State Board of Education and the State Board of Higher Education.

(i) Provide assistance to the House and Senate Education Committees, the Ways and Means Committees and the Emergency Board. These staff members shall provide the legislative committees with the findings of the commission and such other information as may be requested by the committees.

(j) Gather, interpret and evaluate all regular and special applications for federal moneys for financial aid programs in order to insure consistency throughout the public and private post-secondary institutions in Oregon.

(5) Following review of proposed new and existing post-secondary programs and proposed new post-secondary locations, and in the event of seemingly unnecessary duplications or inconsistencies, the commission shall recommend resolution to the appropriate segmental governing board concerned. The commission shall report unresolved issues and deficiencies periodically to the Legislative Assembly with recommendations for resolution. In those cases where the commission determines that a proposed new post-secondary program or a proposed new post-secondary location of a public institution would have a significantly adverse impact on one or more other segments of education, the commission shall have final authority for approval or disapproval, notwithstanding authority given to the State Board of Education in ORS chapters 326 and 341 and to the State Board of Higher Education in ORS chapter 351. Prior to approval or disapproval, the commission shall negotiate with the governing boards of the institutions affected to determine if satisfactory accommodations of the interests can be achieved.

(6) The commission may apply for and accept gifts, grants or services from or contract with nonprofit organizations, educational institutions and other state or federal agencies, and may administer such funds and contracts. Grants from the Federal Government or any of its agencies may be accepted subject to the terms and conditions thereof, regardless of any laws of this state in conflict with the regulations of the Federal Government with respect thereto.

(7) There hereby is established in the General Fund of the State Treasury an account to be known as the Oregon Educational Coordinating Commission Account. All moneys received by the commission shall be paid into the State Treasury and credited to such account and hereby are appropriated continuously for and shall be used by the commission in carrying out the purposes of ORS 348.705 to 348.825.

(8) Members of the commission are entitled to compensation and expenses as provided in ORS 292.495.

(9) Pursuant to ORS chapter 183, the commission may adopt rules necessary to carry out its functions.
[Formerly 351.270]

348.725 Commission duties. In the discharge of its comprehensive planning responsibilities, the commission shall develop, adopt and maintain a comprehensive education plan and related policy objectives,

which include state-wide educational goals and indicators appropriate for evaluating the qualitative and quantitative effectiveness of all aspects of education from kindergarten through post-graduate programs. The commission shall be directly responsible for the development of goals and policies and serve a coordinating role in plan development. Base level planning shall come from each educational governing board submitting plans to the commission, as specified in subsection (2) of this section.

(1) In developing the plan, the commission shall include short-range and long-range projections and shall consider at least the following factors:

(a) The continuity of elementary, secondary, post-secondary, continuing and informal levels of educational activity.

(b) The interrelationships, functions, roles, and responsibilities of each of the several state-wide agencies providing educational services in Oregon, including the coordinating agency.

(c) The range and kinds of educational programs appropriate to each segment, agency and private institution as developed through the procedure specified in subsection (2) of this section.

(d) The impact of budgetary priorities of the segments and agencies.

(e) The impact of student tuition and fees on various types and levels of students, and on educational programs and institutions.

(f) Appropriate levels of state-funded student financial aid.

(g) Access and admissions of students to post-secondary education.

(h) The educational programs and resources of independent and proprietary post-secondary education.

(i) The need for and location of post-secondary facilities.

(j) The desirability of consortia, cooperative efforts and mergers of post-secondary institutions or educational districts.

(k) A plan for monitoring progress made toward the attainment of state-wide educational goals and objectives; and for evaluating the impact of, and necessity for modifications in the comprehensive education plan.

(2) The commission shall require each state educational governing board or each private institutional governing board to submit a long-range plan, in a form and manner prescribed by the commission, for the post-secondary institution or institutions under the board's jurisdiction.

(3) The commission shall offer to the affected boards or their staffs opportunities to participate in the development of the forms, policies and procedures governing the submission of plans.

(4) The commission shall review and coordinate the plans submitted by affected boards, and evaluate them for consistency with the policies, objectives and goals of the comprehensive education plan. In the event of conflicts and inconsistencies, the commission shall recommend resolutions to the affected boards, and report unresolved issues and deficiencies periodically to the legislature with recommendations for their resolution.
[1975 c.553 s.3]

348.735 Meetings; chairman. The commission shall meet as frequently as the proper and efficient discharge of its duties may require. The commission shall choose a chairman from its members who shall preside at its meetings.
[Formerly 351.275]

348.745 Appointment, functions and status of executive director. (1) The commission may employ an executive director who shall:

(a) Attend all meetings of the commission.

(b) Keep a record of the proceedings and transactions of the commission.

(c) Have custody of all books, papers, documents and other property belonging to the commission.

(d) Be the administrative officer of the commission.

(2) Unless otherwise provided by law, the commission shall fix and determine the annual salary of the executive director. The executive director, subject to any other applicable law regulating mileage and traveling expenses for state officers, shall receive his actual and necessary traveling and other expenses incurred in the performance of his official functions. The executive director shall be in the unclassified service for purposes of the State Merit System Law.
[Formerly 351.280]

348.755 Personnel. The commission may employ such other personnel as may be necessary to facilitate and assist in carrying out its functions, and fix and pay the compensation of such personnel. The employment of such personnel shall be subject to any applicable provision of the State Merit System Law.
[Formerly 351.285]

348.765 Approval of disbursements. The chairman of the commission shall approve disbursements for indebtedness or expenses incurred under the provisions of and payable from appropriations made for the purposes of ORS 348.705 to 348.825. The commission may designate the executive director to approve those disbusements, provided that the indebtedness or expense has been theretofore authorized by the commission. If the commission so designates the executive director, it shall file with the Executive Department a statement to that effect together with a sample of his signature.

(Special Programs)

348.785 Program to improve instructional effectiveness or efficiency. The Oregon Educational Coordinating Commission shall administer a program of grants or awards to encourage the development or implementation of alternative techniques or procedures, courses of study or parts of courses, designed to improve instructional effectiveness or efficiency in public two-year colleges and four-year institutions of higher education in Oregon. Such grants or awards may be made to instructional personnel, the institutions or their subdivisions, or other public educational agencies and may be made to instructional personnel in the form of salary augmentation to encourage or reward efforts under this program.
[Formerly 351.297]

348.795 Criteria for grants and awards. The Oregon Educational Coordinating Commission shall develop criteria for the preparation of applications and procedures for the submission, evaluation, priority selection and award of such grants or awards. The commission may contract with the Department of Higher Education or other appropriate public educational agencies to develop program materials and to establish a mechanism at each institution for the purpose of introducing the materials and implementing the techniques. The commission's criteria and procedures shall be designed to assure that:

(1) Projects are directed primarily to the improvement of undergraduate instruction.

(2) Project objectives are stated clearly and the effectiveness of a project is capable of objective evaluation in terms of the improvement of instructional effectiveness and efficiency.

(3) The project design provides a basis or procedure for the objective evaluation of its effectiveness through a demonstration of the learning achievements of students.

(4) Projects have administrative and fiscal feasibility, there is evidence of departmental and institutional commitment to support and implement the project, and there will be cooperation with the commission in an evaluation of the effectiveness of the project.

(5) Priority should be given to lower division, high enrollment courses.
[Formerly 351.298]

348.805 [1969 c.182 s.1; 1971 c.577 s.1; renumbered 348.105]

348.815 Purposes of projects. The projects authorized by ORS 348.785 to 348.825 may be designed to:

(1) Develop and test courses of study or parts of courses which feature predictable student achievement of prestated student performance objectives.

(2) Stimulate the implementation of innovative approaches to instruction within the various institutions, providing training programs as necessary to familiarize faculty and administrators with newly developed instructional methodology.
[Formerly 351.301]

348.825 Advisory committee. The Oregon Educational Coordinating Commission shall appoint an advisory committee which is broadly representative of the institutions and with such other members as the commission deems appropriate, to assist the commission in carrying out the provisions of ORS 348.785 to 348.825.
[Formerly 351.302]

(Degrees)

348.835 Commission approval of degree requirements. (1) No school or other institution of learning shall confer or offer to confer any degree upon any person, in recognition of the attainment or proficiency of such person, in pursuing or graduating from any course conducted by it, without first having submitted the requirements for such degree to the Oregon Educational Coordinating Commission and having obtained its approval of such requirements.

(2) ORS 348.835 to 348.885 shall not apply to any school or institution of learning which has been established and conducted

within this state, and has conferred degrees for a period of 15 years prior to March 4, 1935; nor to any school conducted under the public educational system of the state; nor to any school which is a member in good standing of the Northwest Association of Secondary and Higher Schools; nor to any school which confers degrees only for proficiency in any system or method of healing, nor to any school now conferring the degree of doctor of optometry; nor schools of theology operating on a post baccalaureate degree level.
[Formerly 351.710]

348.845 Revocation of approval; hearing. Approval obtained under ORS 348.835 may be revoked for proper cause by the Oregon Educational Coordinating Commission at its discretion, after a hearing. Such hearing shall be held only after the school or institution of learning involved has been given 20 days' notice in writing of the time and place of such hearing.
[Formerly 351.720]

348.855 Appeal procedure. Any decision made by the Oregon Educational Coordinating Commission refusing any school or institution of learning permission to confer degrees or revoking the right to confer degrees, shall be subject to the right of review by a suit brought in the circuit court of the county in which the school or institution of learning is located. Such review shall be tried as a suit in equity.
[Formerly 351.730]

348.865 Announcement of conferring of degrees before approval of requirements forbidden. Excepting those exempted by ORS 348.835, no school or institution of learning conducted within this state, nor any officer or member thereof, shall announce or advertise that such school or insitution of learning does or will confer any degree upon any person whomsoever without first having complied with ORS 348.835 and 348.875.
[Formerly 351.740]

348.875 Schools to file information; board authorized to inspect; revocation for failure to maintain standards. All schools or other institutions of learning subject to ORS 348.835 shall file such information with the State Board of Education as it may direct. The board may send an expert to inspect any such school or institution of learning. If any such school or institution of learning fails to keep up the required standard, the State Board of Education shall revoke its approval to confer degrees.
[Formerly 351.750]

348.885 Misrepresentation of possession of academic degree prohibited. No person shall lay claim to or represent himself as possessing any academic degree which has not been awarded to or conferred upon him. Any person claiming to be the holder of any academic degree shall, upon request of the State Board of Education, file with it the name of the degree so claimed, the name and location of the institution or school conferring same, the date of conference and a certified copy of the diploma or other document in possession of the claimant and evidencing such degree. Failure to file such information or document shall be prima facie evidence that the claim of such person to such degree is fraudulent.
[Formerly 351.760]

PENALTIES

348.990 Penalties. Violation of ORS 348.210 is a misdemeanor.
[Derived from 351.990]

CERTIFICATE OF LEGISLATIVE COUNSEL

Pursuant to ORS 173.170, I, Thomas G. Clifford, Legislative Counsel, do hereby certify that I have compared each section printed in this chapter with the original section in the enrolled bill, and that the sections in this chapter are correct copies of the enrolled sections, with the exception of the changes in form permitted by ORS 173.160 and other changes specifically authorized by law.

Done at Salem, Oregon,
October 1, 1975.

Thomas G. Clifford
Legislative Counsel

Comprehensive goals and objectives for education in Oregon

OVERALL GOAL: To provide educational opportunities to the citizens of Oregon within the resources available and consistent with the needs and expectations of the people of the State.

GOAL I. "To provide educational opportunities to the citizens of Oregon . . ."

SUBGOAL A. ACHIEVEMENT

OBJECTIVES:

1. Competency in the basic skills of reading, writing, computing, spelling, speaking, listening, and analyzing.
2. Practical knowledge and information essential in a complex society, including maintenance of physical and mental health, and management of personal resources.
3. Ability to earn a living and to contribute productively to society.
4. Ability to accept and to exercise responsibilities and rights as citizens.
5. Ability to cope constructively with change.
6. Understanding and appreciation of our cultural heritage: the arts and humanities; intellectual and moral traditions; the analytical and scientific processes.
7. Understanding of and respect for the diversity of human beings.
8. Understanding of and respect for the environment.
9. A positive attitude toward learning as a lifelong endeavor.

SUBGOAL B. ACCESS/EQUAL OPPORTUNITY

OBJECTIVES:

1. Adequate and reliable information and counseling for making educational and career decisions.
2. Geographic availability of services and financial assistance to individuals based on need and resources available.
3. Participation without regard to race, sex, handicap, age, marital status, religion, or national origin.

SUBGOAL C. DIVERSITY

OBJECTIVES:

1. Flexibility in the delivery of educational services.
2. Public and private institutions, each with defined roles and each committed to achieving the best education possible by concentrating its resources in programs needed to meet its goals and objectives.
3. A sound basis for awarding and transferring credits within the established academic or vocational framework and for work experience or demonstrated knowledge and skills gained outside traditional settings.
4. Research for the generation of knowledge and for its restructuring, application, and distribution.
5. Public service activities consistent with objectives of educational programs.

The goals and objectives have been developed under the planning charge given the Oregon Educational Coordinating Commission in ORS 348.725. They are intended to address expectations for and support of education in Oregon. Included is the premise that freedom of inquiry and expression will be maintained in the educational system, fostering respect for these values in a free society.

These comprehensive goals are intended to serve as a framework within which the educational segments, institutions, and agencies (elementary/secondary districts; community colleges; public four-year institutions; independent institutions; and proprietary institutions) have latitude to plan for and deliver educational services. Policy makers and those charged with allocating resources have a responsibility to relate objectives and expected outcomes to the resources requested and available, assessing alternatives, priorities, and their probable costs and impacts.

GOAL II ". . . within the resources available . . ."

SUBGOAL A. COST-EFFECTIVE MANAGEMENT

OBJECTIVES:

1. Inventory of existing resources, review of program planning, and budgeting to make the best use of existing resources, both public and private.
2. Systematic review and, as necessary, adjustment of the roles of the various segments and individual institutions to relate objectives and outcomes to needs and resources.
3. Clearly stated budget construction and review and post-audit procedures.
4. Consideration of benefits to the individual student and to society in determining levels of public financial support and the financial responsibility of the individual.

SUBGOAL B. EQUITABLE DISTRIBUTION OF FUNDS

OBJECTIVES:

1. Adequate funding to meet needs and to progress toward quality performance.
2. Equitable state support for public institutions and agencies offering equivalent or similar services, taking into consideration all the funds available to education in the State, including those from local, federal, and student sources.
3. Relation of funding to the accomplishment of outcomes.

GOAL III ". . . consistent with the needs and expectations of the people of the State."

SUBGOAL A. POLICY-MAKING

OBJECTIVES:

1. Participation by students, parents, educators, and the general public in defining educational goals, reviewing services and the capacity to fund them, evaluating the extent to which stated goals are being achieved, and revising objectives.
2. Leadership by lay governing boards, educators, and administrators in making decisions affecting the quality of education.
3. Maintenance of a comprehensive information system to facilitate the making of informed decisions in planning, programming, and evaluation.

SUBGOAL B. ACCOUNTABILITY

OBJECTIVES:

1. Evaluation and public report of the status of achievement of educational goals.
2. Responsibility to students and parents as consumers of educational services.
3. Public understanding of the meaning of diplomas, degrees, certificates, and other measures of abilities, skills, and achievement.
4. Programs based on state, regional, and national manpower needs.
5. Stimulus for students to fulfill their highest potential and for educators to maintain continuous professional growth.

The goals and objectives were adopted September 20, 1976 on an interim basis by the Oregon Educational Coordinating Commission. The Commission expects in the 1977-79 biennium to provide opportunities for wider public participation in reviewing and, as appropriate, revising the goals and objectives.

During development of the interim goals over a four-month period, public hearings were held and suggestions received from the State Boards of Education and Higher Education, the Commission's Advisory Committee, Oregon Congress of Parents, Teachers and Students, Oregon Student Lobby, Oregon Association of Independent Colleges, Oregon Private School Association, Oregon School Boards Association, and others.

Oregon Educational Coordinating Commission
SALEM, OREGON 97310

Appendix B
Long-Range Planning Policy
Recommended Outline

I. Background conditions - need for planning policy

- A. Legal responsibility and authority
- B. Anticipation of alternatives, determination of options
- C. Responsiveness and accountability to patrons, taxpayers
- D. Responsibility to State Board, other agencies
- E. Complexity of current and future operations and environment
- F. Improved productivity and efficiency
- G. Community philosophy and conditions

II. Resources and support

- A. Board and administrative commitment
- B. Execution of policy
- C. Allocation of time, facilities, expense

III. Planning goals and objectives

- A. Results expected from planning process
- B. Definitions and examples of goals
- C. Maintaining flexibility and options
- D. Long-range and short-range perspectives
- E. Supporting analysis
- F. Continuity and maintenance of planning process

IV. General guidelines

- A. Process open and accessible to public and constituencies
- B. Participation of various groups and citizens
- C. Availability and communication of planning information
- D. Direct involvement of Board, Superintendent, President
- E. Quantification or other specificity of results as practicable

V. Timing and documentation

- A. Review and revision cycles - e.g. quarterly, annual
- B. Relationship of planning to budgeting
- C. Specific functional plans - finance, staffing, facilities, curriculum
- D. Levels of activity and schedule
- E. General planning calendar

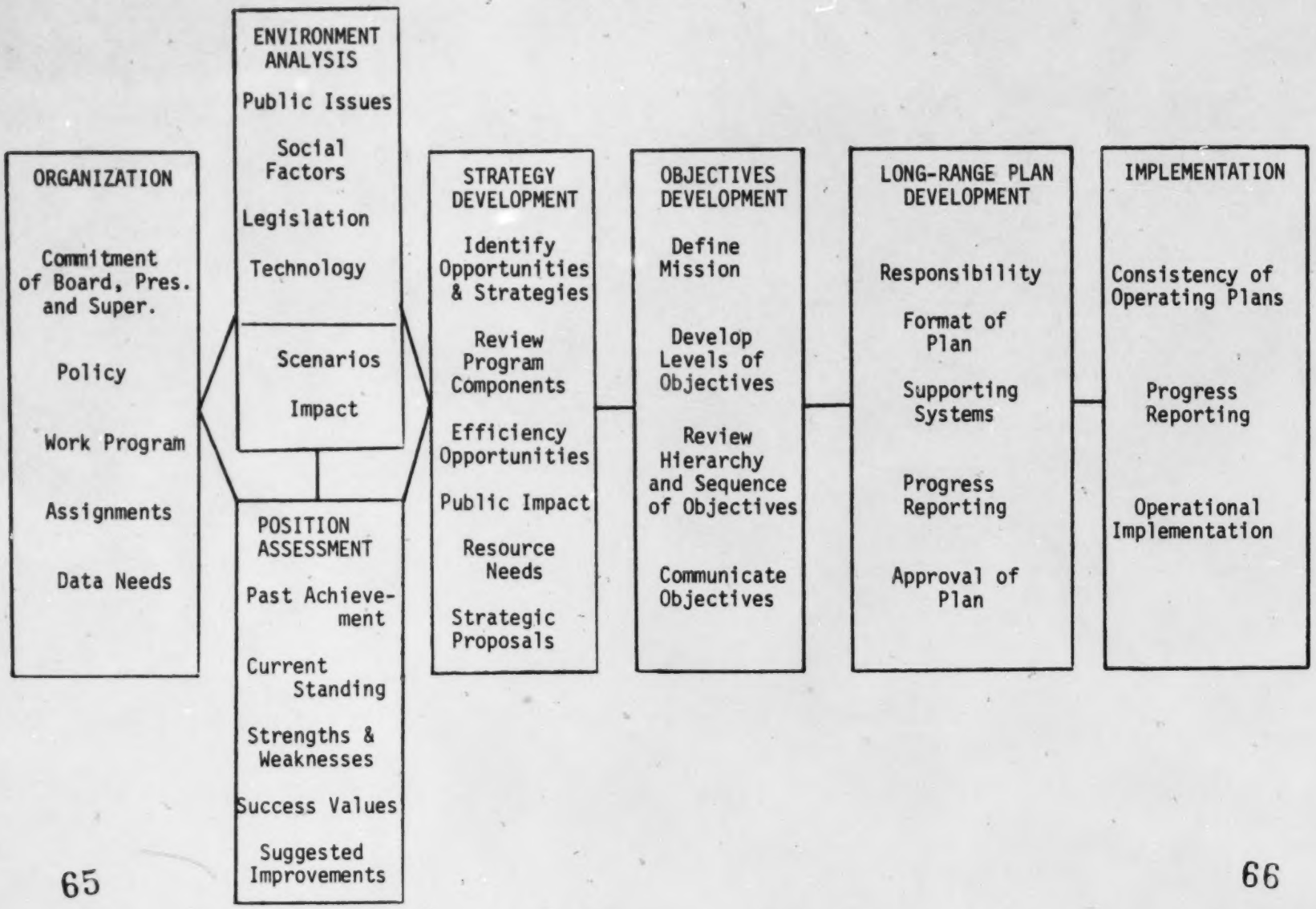
VI. Distribution of responsibility

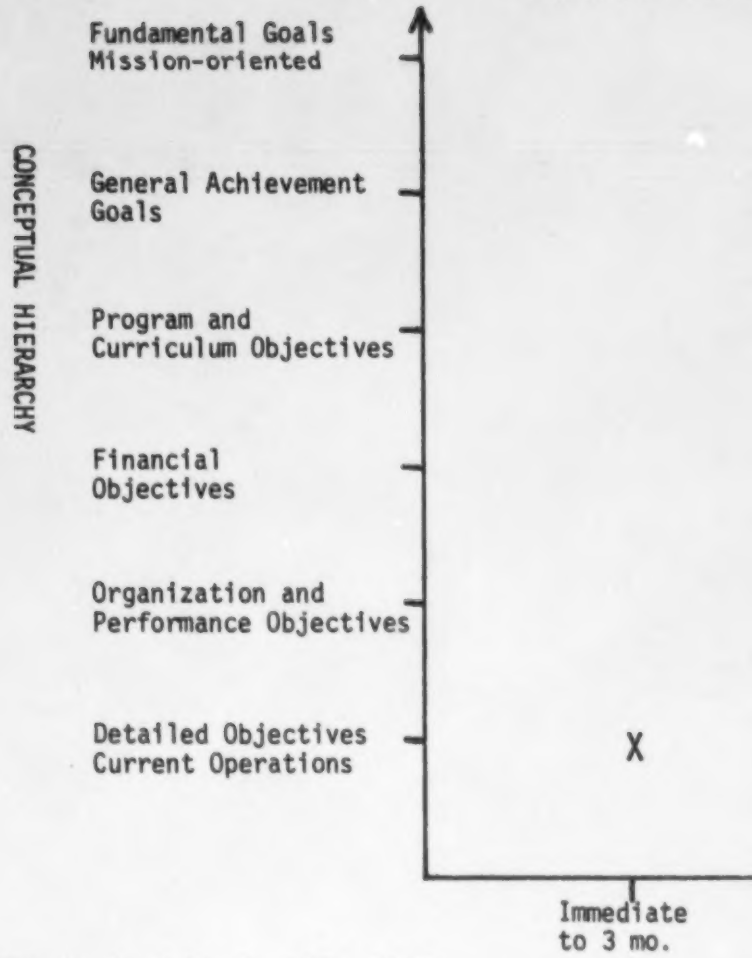
- A. Board support and participation
- B. Administrative assignments
- C. Staff and faculty contributions

VII. Evaluation of process and results

- A. Periodic review of goal achievement
- B. Execution of responsibilities
- C. Changes in public awareness and support
- D. Feedback to involved parties, patrons, state agencies
- E. Independent review
- F. Future refinement of process

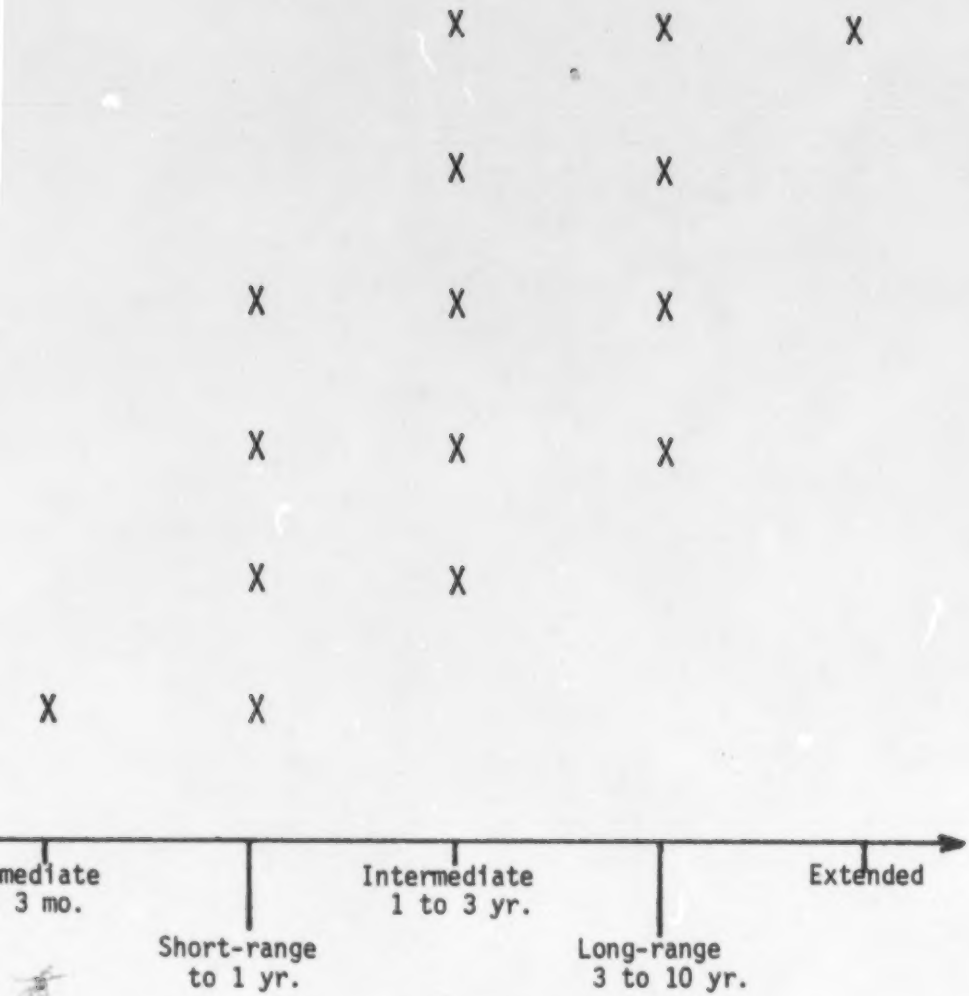
LONG-RANGE PLANNING PROCESS



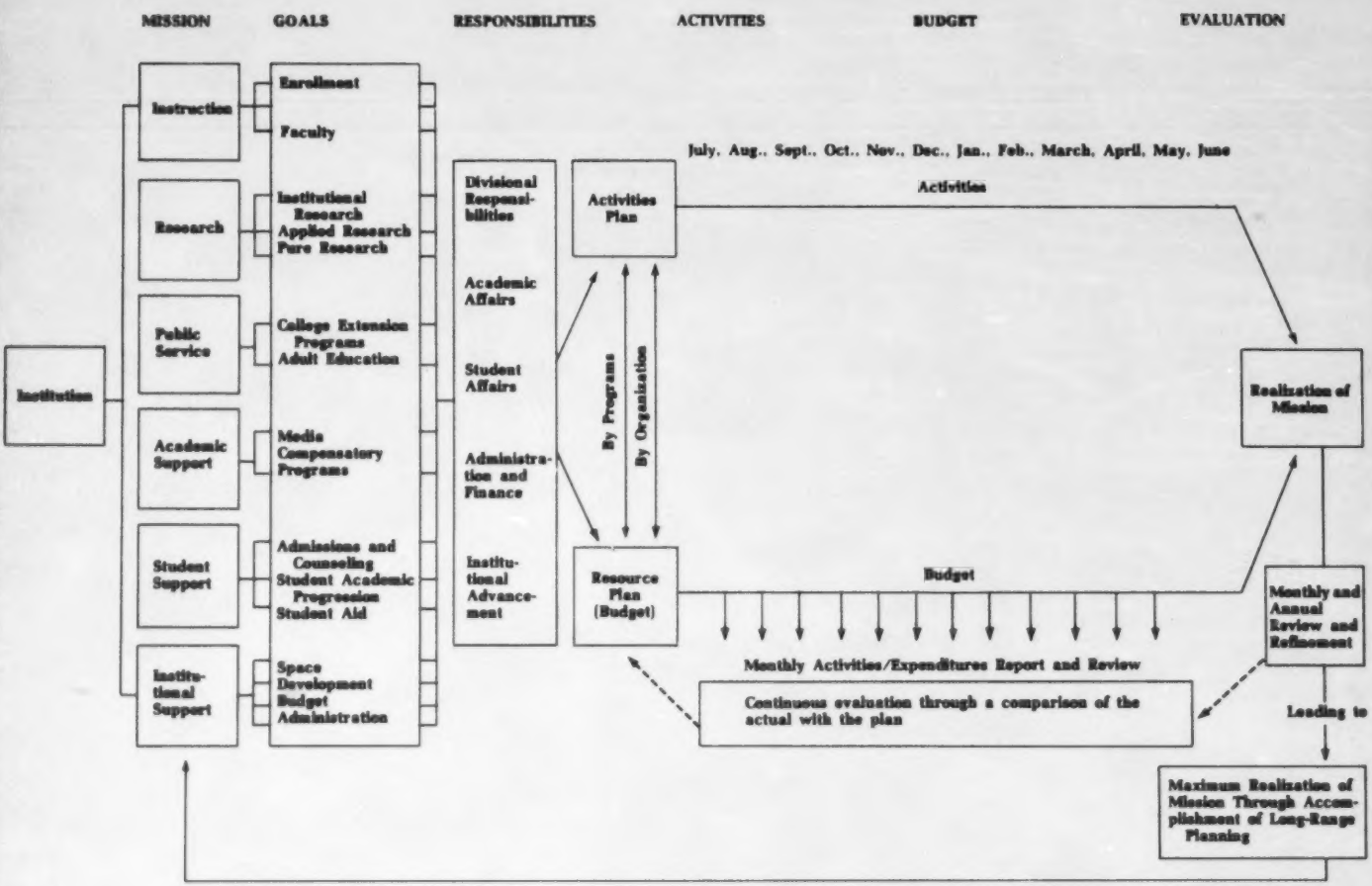


Placement of X's in this matrix indicates a time scale for various objectives, suggests review frequency, and may indicate ability to measure accomplishment.

ESTED GOAL RELATIONSHIPS



LONG-RANGE PLANNING/COMPREHENSIVE MANAGEMENT SYSTEMS MODEL



This chart is reproduced from Long Range Planning by Satish B. Parekh, with permission of the author. Dr. Parekh is the Executive Director of the National Center for College and University Planning, located in Baltimore, Maryland. This chart can also be adapted for use in school districts.

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State System of Higher Education

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State System of Higher Education

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University of Oregon

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Oregon State University

Joseph Blumel, President
Portland State University

Gerald Leinwand, President
Oregon College of Education

Rodney Briggs, President
Eastern Oregon State College

James Sours, President
Southern Oregon State College

Philip Bainer, President
Clatsop Community College

Kenneth Light, President
Oregon Institute of Technology

Steven Nicholson, President
Mt. Hood Community College

Amo DeBernardis, President
Portland Community College

Ray Needham, President
Linn-Benton Community College

Fred Boyle, President
Central Oregon Community College

Jack Brookins, President
Southwest Oregon Community College

Marvin Evans, Superintendent
Lake Oswego School District 7

Donald Charles, Superintendent
North Clackamas School District 12

Thomas Payzant, Superintendent
Eugene School District 4J

Harold Kleiner, Deputy Superintendent
Portland School District 1

Donald Olmscheid, Superintendent
St. Helens School District 502

Bert Kleiner, Superintendent
Silverton School District 4

John Thompson, Superintendent
Silverton UH 7J

Dr. Ernest Ettlich
Dean/Academic Affairs
Southern Oregon State College

Paul Olum, Provost
University of Oregon

John Lotass, Executive Dean
University of Oregon

Milos Popovich
Vice President/Administration
Oregon State University

Leon Richelle, Vice President
Portland State University

Sister Veronica Ann Baxter
Marylhurst Education Center

Senator Clifford Trow, Chairman
Senate Education Committee

Representative Sam Johnson

Rev. Paul Waldschmidt, Former President
University of Portland

Sedley Stuart, Member & former Chairman
State Board of Education

Wanda Silverman, Chairperson
State Board of Education

Thomas Sommerville, Superintendent
Multnomah County ESD

William Proppe, Superintendent
Washington County ESD

Robert Hamill, Assoc. Superintendent
Department of Education

Jewell Manspeaker
Department of Education

Milt Baum, Assoc. Superintendent
Department of Education

Rep. Vera Katz, Co-chairman
Ways & Means Committee

Senator Victor Atiyeh

Dr. Tom Sine, College of Education
University of Washington

Dr. Charles Burgess, College of Education
University of Washington

John Howard, President
Lewis & Clark College

James Miller, President
Pacific University

Terry Olson, Executive Director
Stafford Hansell
Robert Root
Elizabeth Johnson
Edith Maddron
James Meyer
Oregon Educational Coordinating Commission

C. Girard Davidson, Former Chairman
Oregon Educational Coordinating Commission

Dr. Lloyd DuVall, Director
Center for Educational Policy
and Management
University of Oregon

Dr. Philip Piele, Director
ERIC Clearinghouse on
Educational Management
University of Oregon

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